ACUBASE 2.003™

User's Manual

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Chapter 1: Installation of AcuBase™

Hardware Requirements

To run AcuBase™, you need the following minimum hardware and software:

- any Macintosh with a Power PC 601 Processor or higher (including Mac OS X) with at least 32 MB of RAM, or
- an Intel compatible Pentium-class 486/33 or higher computer with 32 MB of RAM
- a hard disk with at least 50 MB of free memory
- a CD-ROM drive
- Apple System 8.1 or higher, Windows 95, Windows 98, Windows Me, Windows 2000 Professional, Windows NT 4.0 (with Service Pack 3 or later), or Windows XP
- a laser printer or high quality ink jet printer

Running the installation

Apple Macintosh (including OS X)

To install and run AcuBase™ on a Macintosh that meets the above minimum requirements, do the following:

1. Insert the CD into your CD drive (printed side up).

2. Simply drag the AcuBase™ folder from the CD onto your hard drive. (Do NOT drag the Herbpix.tcm file over.) Mac OS X users should copy only the AcuBase for OS X folder over. Other Mac users with OS 8.1 through 9.2, should copy the other AcuBase folder.

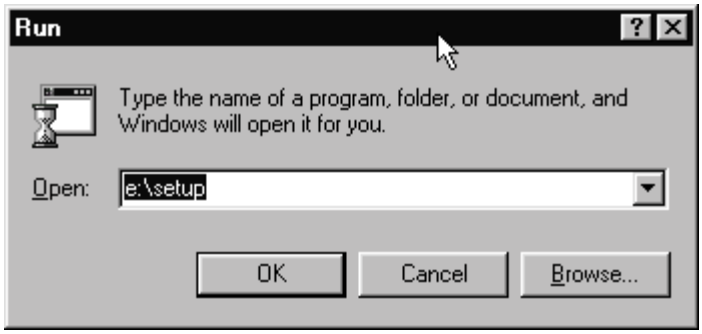
Microsoft Windows

To install and run AcuBase™ on a Windows-based machine that meets the above minimum requirements, do the following:

1. Insert the CD into your CD drive (printed side up).

2. From the Start button, go to Run.

3. From within Run, type "*x:*\setup.exe", where *x:* equals the drive letter of your CD-ROM drive.



4. Once the install completes, you will be given the option of starting AcuBase™.

5. AcuBase™ creates an "AcuBase" folder, which it places under the "Programs" group under the "Start" button. From within this folder, select the "AcuBase™" icon. The program files default to reside in the "C:\Program Files\Trigram Software\AcuBase" directory.

Uninstalling AcuBase™

- To uninstall AcuBase™ on a Macintosh, simply drag the AcuBase folder to the trash.
- To uninstall in Windows, go to the Control Panels, Add/Remove Programs, and remove AcuBase™. You may also remove the program from its default installed directory at C:\program files\trigram software\AcuBase .

Important Notes

- Always close AcuBase™ before shutting down your computer. Since AcuBase™ saves as you go, it may not have saved all of your data if the computer is shut down while the program is open. In most cases, the next time AcuBase™ is opened, it will recover whatever data was in the database the last time it was opened.
- Do not move or rename any AcuBase™-related files. AcuBase™ recognizes its files only in their original form as they were installed from the CD, and will not work properly if any file names or file locations are changed.

What Else Is On The CD?

In addition to the AcuBase™ program files, you will also find:

- A directory / folder called “Document.” This directory contains an Adobe PDF file of all of the instructions available in this user’s manual, as well as a free, installable copy of Adobe Acrobat for users who do not already have the program on their computer. Double-click on either file to run it.
- A directory / folder called “Ebilling.” This directory contains files you may need in order to activate the electronic billing features of AcuBase™. See the Electronic Billing chapter for more information.
- Macintosh users may see two AcuBase install folders: one for Mac OS X, and the other for all other Macintosh operating systems (8.x and higher).

Recovering Damaged Files

Power failures, hardware problems, shutting down your computer before quitting out of AcuBase™, and other factors can damage the AcuBase™ database files. If AcuBase™ becomes damaged, a dialog box will appear telling you to contact the AcuBase™ developer. Once you know that a file is damaged, you can recover it.

To recover a damaged file,

1. Try to open AcuBase™ as you normally would, and press Option-Command (Macintosh) or Control-Shift (Windows) while the file is opening. Hold the keys down until you see the Recover File dialog box.

   If you are able to open the AcuBase™ Main Menu without difficulty, you may go to the Commands menu and select "Recover Damaged File(s)".

2. Select "Mainmenu.TCM" (or whatever file AcuBase™ tells you is damaged) and click on the "Open" button. AcuBase™ recovers the file, and saves a copy of the old, damaged file as "Mainmenu Old.TCM."

3. Close the "Recover Damaged File" dialog box.

4. Once AcuBase™ is open, go to File, Save a Copy As, and save a compressed copy, naming it Mainmenu.TCM (replacing the original file).

NOTE: Always close AcuBase™ before shutting down your computer. Since AcuBase™ saves as you go, it may not have saved all of your data if the computer is shut down while the program is open. In most cases, the next time AcuBase™ is opened, it will recover whatever data was in the database the last time it was opened.

Upgrades and Fixes

The makers of AcuBase™ welcome your comments when you find bugs in our program and/or if you feel that there are features that you might like to see included in a future release of the program. Please e-mail suggestions to support@trigram.com.

When bugs are found, or when we upgrade a file or add a new feature, the new or fixed file may be found and downloaded from the Trigram Software web site at www.trigram.com. While we do offer free updates to the program when bugs are fixed or new features are added, we do charge an upgrade fee if we need to help you with your upgrading of file fixing from the Web. We also when we upgrade to a new database engine, as this upgrade often requires an import of data from your previous version, as well as a new CD.

Backing Up Your Files

The makers of AcuBase™ ARE NOT RESPONSIBLE FOR DATA LOST WHEN NO BACKUP HAS BEEN MADE.

It is *essential* that you keep a backup of all files related to AcuBase™, as well as any and all other mission-critical files that you use. This is your responsibility as a business person and a prudent computer user. We recommend using a Zip Drive (By Iomega) on a daily basis (use 5 disks—a separate disk for every day of the week), which can hold at least 100 megabytes of data on each ZipDisk. Any other media that may provide reliable backup of at least 50 megabytes of data and is easy to restore in case of data loss may also be employed. Note that backing up to a CD-RW makes the AcuBase™ files read-only. If you need to recover lost data from a backup on CD, you will need to select all of the files after you've moved them to your hard drive, and then un-select the "Read-Only" designation in order to make your files modifiable.

Simply backing up the AcuBase™ folder/directory (with the program CLOSED) will save all data related to the program. Mac users, copy the AcuBase™ folder from your hard drive to your backup media. PC users, back up the AcuBase™ directory, located at C:\program files\trigram software\AcuBase (where "C:" equals the letter of your hard drive).

Moving AcuBase to a Different Machine

Your software license permits you to install and use one copy of the program on one machine only. Trigram Software does not support the use of AcuBase™ in more than one location or over a network.

Situations will arise where you may buy a new machine or wish to simply move the program over to a different computer. Whether on a PC or a Macintosh (or between the two), you may move your software from one computer to another by doing the following:

1. Make a full backup of the AcuBase™ directory / folder on your original computer (the one you wish to move data *from*) per the backup instructions above.

2. Install AcuBase™ from the CD onto the newer computer (the one you wish to move data *to*) per the installation instructions above.

3. Copy the contents of your backup file (all of files in the AcuBase™ directory / folder on your backup media) into the newly-installed AcuBase™ directory on the newer

computer, replacing existing files. (PC users, your files will be located at C:\Program Files\Trigram Software\AcuBase by default, where "C:" equals the letter of your hard drive). Again, you will copy all of the files *inside* of the AcuBase folder that you backed up *into* the newly installed AcuBase™ folder on the new machine. Simply copying the backed-up AcuBase™ folder and pasting it inside of the newly installed AcuBase™ folder will not work.

Registering Your Software

It is important that you register your copy of AcuBase™ as soon as you receive the program so that you may get support and upgrade pricing in the future. You may register by sending in the registration card that is in the front of this manual, or by e-mailing your name, address, phone number, date of purchase, and vendor name (from whom you purchased AcuBase™) to registration@trigram.com. You may also mail this information to Trigram Software, Attn: Registration, 6114 LaSalle Ave., PMB 230, Oakland, CA 94611.

Further Help

AcuBase™ comes with 90 minutes of free customer support. After that, we charge $99 per year for 10 hours of support and unlimited upgrades. Otherwise, the minimum charge for support is $15 for the first 15 minutes, then $1.00 per minute after that, or $45 per call, on your Visa or MasterCard.

Most AcuBase™ help is available through the program itself, using the "help" buttons located on almost every screen and in this manual. If you have tried these sources and you are still having problems, please contact Trigram Software for further assistance with any aspect of AcuBase™.

Note that your free 90 minutes of support does not include help related to how to do your billing, i.e., which codes are appropriate to use, how many procedures to bill, etc. We also charge for all help related to electronic billing (which is included in the $99 per year support contract mentioned above).

For AcuBase™ questions or problems, start by checking the Trigram Software support page at www.trigram.com, or contact Trigram Software Monday through Friday from 9 AM to 5 PM US Pacific Time. Phone U.S. 1-888-4ACUBASE, 510.654.3268, or e-mail support@trigram.com.

Chapter 2: Getting Started with AcuBase™

About AcuBase

AcuBase™ was developed by a team of programmers from Trigram Software, most of whom are also intimately involved in various medical modalities. AcuBase™ 2.003 is the sixth major upgrade from the original, best-selling AcuBase Standard released in 1997.

The first version of AcuBase™ was developed for use by clinicians of traditional Oriental medicine. It included reference materials on herbal medicine, acupuncture, and preparation tools for those interested in sitting for the national board exams in these subjects. We have since added practice management and billing features made to work for any medical practice, and we currently serve practitioners in all major areas of medicine, both "mainstream" and "alternative."

In this, the latest version of our practice management solution, we wanted to develop new tools for the everyday practitioner that are at once practical and not overly complicated, and to offer all of it at a bargain price. Most of the newest features available in this version were suggested by existing users whose comments have made our program what it is today. As an added benefit, and for anyone interested in pursuing traditional Oriental medicine, we have left intact the option of viewing the Oriental medicine reference library, which may be turned on or off through the Main Menu's Preference button.

We welcome all comments and suggestions! If you have anything to suggest upon using the program, please forward your comments to support@trigram.com.

An AcuBase Overview

Recommended for practitioners, AcuBase™ has what you need to manage your knowledge and your practice. AcuBase™ is extremely intuitive and easy to use, even for those who fear the sight of computers. It works on the Macintosh and PC, and consists of the following components and features:

Main Menu

The Main Menu is your starting place from which you may access all of AcuBase's power and flexibility. New users should start by adjusting the Preferences to their liking before using the rest of the program (by clicking on the Preferences button at the top-left portion of the Main Menu screen). Use the Main Menu to jump to any of the main functions of AcuBase™, and, perhaps most significantly, to set up and change the Preferences that will be used throughout the program. Use the Preferences button in the Main Menu to:

- Enter up to three user names, license number(s), tax id number(s), and company names and addresses. This information is automatically printed on invoices, forms, and throughout many different reports

- Insert your own logo into AcuBase™. This logo not only appears on many of the database screens, but may also be printed on several AcuBase forms.

- Choose the currency you would like to use (dollars, pounds, francs, yen, etc.), and tax rates for your products and procedures.

- Set up procedures, as well as codes, modifiers, prices, and tax rates for each. Set up diagnosis descriptions and codes, as well. Because so many of our users practice Chiropractic and/or Oriental medicine, AcuBase™ comes with many of the most popular procedures for these modalities, and almost 2,000 diagnoses, with associated U.S. CPT and ICD-9 codes.

- Choose billing-specific defaults, including preferences for how you enter data, determined by whether or not you use the HCFA 1500 form. You can change the way your statements look, and may even type in text that you would like to appear on HCFA forms by default.

- Customize up to five different letters in AcuBase: A new patient letter, referral thank you letter, birthday letter, and two other custom letters of your choosing.

- Create a default patient intake form, initial report, and one custom patient-related form.

- Activate electronic billing.

- Set up a password entry system to protect your data and the privacy of your patients' personal information.

- Determine how your records print out of AcuBase. Will you preview them on the screen first, then print, or would you rather just print them without previewing them? Or JUST preview them on the screen and not print at all?

Patient Information & Billing

The Patient Information database was designed by practitioners around the way a clinic typically functions. It integrates data from throughout AcuBase™, and includes great features such as:

- General patient data, including insurance information.

- Patient medical information, with diagnosis pop-up screens that may be easily edited.

- Full electronic billing capabilities.

- An activity list that gives you access to the details of all patient-related activity—every phone call made, every fax sent, every intake taken, and even patient progress reports—all at your fingertips.

- HCFA 1500 forms and Superbills that allow you to bill for services as well as for products such as herbs and formulas.

- Full integration with the rest of AcuBase™. Medical and billing information, clinic address information, diagnoses, procedures, prices, and even tax rates automatically flow through to superbills and activity records. And products that are sold to patients are automatically taken out of your available inventory!

- Extensive reporting capabilities for all aspects of your practice.

- Print out a personal "Contacts Phone Book."

- Print Avery labels to make mass mailings a snap.

- Print out individual envelopes.

- Print out new patient letters, referral thank you letters, and more.

- Context-sensitive help available from any screen.

Insurance Companies and Referral Sources

The Insurance Companies and Referral Sources databases are a place for you to enter commonly-accessed insurance company and referral source information. These databases allow you to:

- Enter an unlimited number of insurance companies or referrers.

- Keep this information current in one place, and have it auto-entered into the appropriate places in the Patient Information and Billing database.

- View lists of which patients were referrer by which referral sources, as well as which patients have a given insurance company.

- Print insurance company or referrer mailing labels, envelopes, or phone books.

Inventory

Who could say they have a comprehensive office management solution without including an inventory tracking system? If we sell products of any kind, we need to know how much of each product we have on hand, how much we have sold, taxed, etc. In a busy practice and without any guidance, keeping track of such inventory can be unmanageable. But with AcuBase™, inventory tracking is not only manageable, it's easy!

The AcuBase™ Inventory database includes:

- The ability to keep track of an unlimited number of items.
- Full integration with the rest of AcuBase™. Automatic adjustments of available inventory as items are sold to patients. All vendor information is related to each item in inventory.
- The option to set prices and even taxes on an item-by-item basis.
- The ability to create categories (such as "Needles," "Supplements," or whatever other category you may wish to use to classify the kinds of items you wish to track).
- An intelligent "feeler" that tells you the last time you inventoried or stocked a given item.
- Customizable fields that allow you to determine the amount of an item to keep on hand, what measurements to use (pounds, boxes, etc.), when to reorder a given item , and the number of each item currently open to buy (based on amount in stock).
- Reports that allow you to sort and print all of your inventory (or only certain categories of it) by category, by supplier, or otherwise.

- Blank inventory sheets that lists all items by category to make taking a manual inventory at your office(s) quick and easy.
- Standard Avery labels for all items that include the amount to keep in stock and the supplier for each item.
- Context-sensitive help at every turn.

Vendor Information

Not only does AcuBase™ come with thousands of records in its Reference Library, and many useful practice management tools, but you may also enter information related to your top inventory suppliers. In addition, for those who use Oriental medical supplements, we have already entered information from top suppliers. Trigram Software has been given permission from some of the world's top suppliers of herbs, formulas, patent formulas, Oriental medical information, and related supplies to include their vendor and product information in our databases. We have poured much of this information into our Patent Formulas and Vendor Information databases. The Vendor Information database allows you to:

- Keep track of, edit, or delete available vendor contact information, including addresses, phone numbers, and other info.

- Add, edit, or delete your own vendors and their related information.
- For each vendor, view their related patent formulas, standard formulas, herbs, and any products that you may have purchased from them and keep in inventory.
- Link directly to any related patent formula, standard formula, herb, or inventory item associated with a given vendor.
- View copyrighted information supplied to Trigram Software with permission from top vendors, including: Blue Poppy Herbs, K'an Herbs, Health Concerns, East West Herbs, Evergreen Herbs and Medical Supplies, Golden Flower Chinese Herbs, Mayway (Plum Flower and Min Shan), Chinese Modular Solutions, Spring Wind Herbs, Tashi Enterprises (Min Tong), NuHerbs, Sun Ten / Brion Herbs Corp., and the Institute for Traditional Chinese Medicine and Preventive Health.
- View available context-sensitive help at every turn.

Reference Library

Not only does AcuBase™ provide you with many great practice management tools, we have also included a free traditional Oriental medical library, complete with almost 2,000 records: hundreds of formulas, herbs, points, review questions taken from state and national board exam reading lists, and over 500 patent formulas and related information from the top vendors in the industry! While this may sound great in itself, perhaps the most valuable part of this library is what doesn't come with it: your personal clinical preferences and experiences, which each database has been designed to incorporate. That's right, the Reference Library has been designed to accommodate *your* techniques, *your* preferences, and *your* clinical experiences.

The Reference Library features:

- Almost 3,000 records: herbs, formulas, patent formulas, acupoints, a drug / herb information database, and several hundred review questions.
- Point-, herb-, and formula-specific layouts.
- Chinese characters for herbs and formulas.
- Full integration with the rest of AcuBase™. For each herb, view related formulas and patent formulas, as well as vendors who supply each herb and how much you may have in stock. For formulas and patent formulas, link directly to the vendors that supply each formula and read through vendor-supplied information; adjust your inventory; and link directly to the herbs in each formula with a click of the mouse.
- Reports that print in a variety of formats, including index cards and formulas with associated dosages and Chinese characters.
- The ability to view potential interactions between the most popular prescription and over-the-counter medications and herbal medicines, as well as a list of herbal equivalents to popular medications from John Chen, Pharm.D., D.O.M., L.Ac., founder of Evergreen Herbs and the Lotus Institute. You may also view and print extensive pharmacokinetic information written by Dr. Chen.
- The ability to add, delete, and/or edit any information in any field, and add or delete any records
- Easy, flexible searches for symptom-specific data.
- Sorting by any field with the click of a button.
- A consistent, intuitive interface.

- Context-sensitive help available from any screen.

And all the other features that made our first AcuBase program *the standard* for traditional Oriental medical reference software!

Getting Around in AcuBase™

In the following chapters, we will document the many different functions and ways of using AcuBase™. While each portion of the program is unique in its own way, the fact that all of the program was developed from within Claris FileMaker Pro means that several basic rules apply to the use of the program. What follows are how-to's about some of the most basic functions of AcuBase™ …

Menus Versus Buttons

AcuBase™ was created in FileMaker Pro 5.5. As a result, users have access to many of the menu items at the top of the screen that FileMaker provides.

We highly recommend that AcuBase™ users stick to the buttons at the top of each screen which have been provided. While you may add a new record, for instance, from the File menu, the New Record button has scripts that make sure that the integrity of the database is kept consistent. The one exception to this suggestion is the Commands menu. The Commands menu has a list of commands for which keyboard shortcuts may be used. These shortcuts, once learned, may provide faster navigation through the program without the necessity of using the mouse.

Entering Data

- Type the data directly into a field, or

- Select the data from a value list if the field is formatted to display values with a pop-up list, pop-up menu, check boxes, or radio buttons.

To Move To A Field

- Click in the field where you want to enter data.
- Press Tab to move to the next field in the tab order.
- Press Shift+Tab to move to the previous field in the tab order.

To Move To A Record

- Press Command+Tab on the Macintosh or Ctrl+Down Arrow on the PC to move to the next record or click on the lower page of the book icon in the upper left corner.
- Press Shift+Command+Tab on the Macintosh or Ctrl+Up Arrow on the PC to move to the previous record or click on the upper page of the book icon in the upper left corner.

To Save Data

- AcuBase™ saves as you go, so there is never any need to click a “save” button.

To Add & Duplicate Records

- To add a new record, choose the New Record button or New Record from the Mode menu.
- To duplicate a record, go to the record you want to duplicate and choose Duplicate Record from the Mode menu.

To Delete Records

BE ADVISED! When you delete a record, you are permanently discarding the data you entered in all the fields in that record! THERE IS NO WAY TO BRING BACK DELETED RECORDS UNLESS YOU HAVE MADE A BACKUP OF THE FILE.

You may delete any single record by simply clicking on the “Delete” button. You can also delete a group of records, or all of the records in a file.

To delete a record:

1. Select the record you want to delete by bringing it into view on your screen.

2. Click on the Delete Record button.

3. In the message that appears, click Delete.

To delete a group of records:

1. Perform a Find to select the group of records you would like to delete.

2. Choose Delete All from the Mode menu.

3. In the message that appears, click Delete.

To delete a whole line of codes:

If you wish to delete a whole line from the Procedures section of an invoice, or a whole CPT or ICD-9 description and code from the database (including blank lines),

1. Go to the line you wish to delete, and click between two fields so that the whole line lights up / is selected

2. Click on the “delete” or backspace key on your keyboard.

3. In the message that appears, click Delete.

To Find Records

To find a record or set of records:

1. Go to the layout you want to use to find records.

2. Choose the Find button at the top of the screen.

3. You see a blank find request that looks like a record without data.

4. Type values in the appropriate fields.

5. Click the Find button on the left side of your screen.

To perform an AND request, type multiple values into one or more fields on a single find. To do an OR request, type each value on a new request by selecting New Request from the Edit menu while in Find mode. To exclude records from a request, enter the values you want to exclude from within find mode (as if you wanted to find them), and then check the “omit” checkbox on the left side of the screen before clicking on the “Find” button on the left side of the screen.

You may also use an "operator" to further refine a search. The operators are the options that come up when you click on the "Symbols" down-arrow on the left side of the screen

To find values that are	Use this operator	Example
Less than what you type next	<	<40 or <09/09/1995
Less than or equal to what you type next	<	<rrr or <05:00:00
Greater than what you type next	>	>95129 or >10/10/1996
Greater than or equal to what you type next	>	>baa or >8:00
An exact match	==	==Smith but not Smithson.
Within the range you specify	_	12:30_17:30
Duplicate values	!	! or !Smith
Today's date	//	//
Invalid dates or times	?	?
One unknown or variable text character	@	@on
Zero or more unknown or variable text characters	*	*smith*
Literal text in a field (to find characters that aren't indexed)	" "	"Jean-Louis" or *", Ltd."
Empty fields (for example, records of unfilled orders)	=	=

Once you have done a search (a "Find") for a set of records, only those records are available to view from that point forward. To bring all records in the database back into the "found set," click on the "Find All" button at the top of the screen.

Replacing Fields in All Records

There may come a time when you wish to change a given field in a part of AcuBase™ and have that change be identical throughout all of your records. For instance, you may wish to change all patients from one provider to another. To do this,

1. Do a find for all of the records for which you wish to replace the data in a given field. In the example above, you may wish to find all patients who have "Dr. X" as their provider.

2. Go to the field you wish to replace the data in, and replace the data that is already in there with the changed data. In the example, we would change one of the patient records' provider from the old, "Dr. X," to the new data, "Dr. Y."

3. Once the data is changed, make sure your cursor is still in the field you wanted changed, and hold do a "Cntrl + =" (the Cntrl key and the "equals" key on your keyboard. Mac users, "Command + ="). You will see a dialog box that asks you if

you would like to change the data in all of the other current records to match the data in this record. Choose "Yes" and you have done it.

Note that, once the change has been made, it is immediately saved and cannot be undone unless you go through the same process again (re-replacing the data with your pre-existing data for that field), or recover from your last good backup.

To Change Printer Settings

AcuBase™ reports are generally set up to print on U.S. standard 8.5" x 11" paper, Avery labels, and #10 envelopes. To change these settings,

1. Click on the report that you would like to print and view it in "Preview" mode.

2. Go to the "File" menu and select "Print Setup…"

3. Change your page setup to whichever standard you would like to use (different page size, letter size, landscape vs. portrait view, etc.) and click "OK."

4. View the new settings in "Preview" mode before printing. NOTE: If you wish to use a page setup that differs from the AcuBase™ standard for any given report, you will need to go through these steps *each time* you print.

To Change The Look Of Invoices Or Activities

If you own FileMaker Pro 5.0 or higher for Mac or PC, and know the program well, you may change the look of your faxes, intakes, call records, patient progress reports, and/or patient invoices/superbills. To do this,

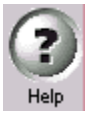
1. Open FileMaker Pro.

2. From within FileMaker Pro, go to File, Open.

- To change the look of activities such as faxes, intakes, call records, or patient progress reports, open the Activities database from within the AcuBase folder on your hard drive and go to each respective activity's print layout. To change the look of invoices/superbills, open the Billing database and go to the "Detailed Intake Print" layout.

NOTE: Trigram Software support will NOT assist you in the event that you attempt to change default layouts and/or lose data after modifying the Activities or Billing databases. If you decide to modify these files, it is assumed that you know and understand the intricacies of FileMaker Pro, and you do so at your own risk!

Getting Help



To get help from any screen, simply click on the "Help" button for that screen.

Quitting Out of AcuBase™

To exit out of AcuBase™ completely from anywhere in the program, simply click on the File menu and select "Exit" or "Quit."

Chapter 3: The Main Menu

The Main Menu: An Overview

The Main Menu is your starting place from which you may access all of AcuBase's power and flexibility. New users should start by adjusting the Preferences to their liking before using the rest of the program (by clicking on the Preferences button at the top-left portion of the Main Menu screen). Use the Main Menu to jump to any of the main functions of AcuBase™, and, perhaps most significantly, to set up and change the Preferences that will be used throughout the program. Use the Preferences button in the Main Menu to:

- Enter up to three user names, license number(s), tax id number(s), and company names and addresses. This information is automatically printed on invoices, forms, and throughout many different reports

- Insert your own logo into AcuBase™. This logo not only appears on many of the database screens, but may also be printed on several AcuBase forms.

- Choose the currency you would like to use (dollars, pounds, francs, yen, etc.), and tax rates for your products and procedures.

- Set up procedures, as well as codes, modifiers, prices, and tax rates for each. Set up diagnosis descriptions and codes, as well. Because so many of our users practice Chiropractic and/or Oriental medicine, AcuBase™ comes with many of the most popular procedures for these modalities, and almost 2,000 diagnoses, with associated U.S. CPT and ICD-9 codes.

- Choose billing-specific defaults, including preferences for how you enter data, determined by whether or not you use the HCFA 1500 form. You can change the way your statements look, and may even type in text that you would like to appear on HCFA forms by default.

- Customize up to five different letters in AcuBase: A new patient letter, referral thank you letter, birthday letter, and two other custom letters of your choosing.

- Create a default patient intake form, initial report, and one custom patient-related form.

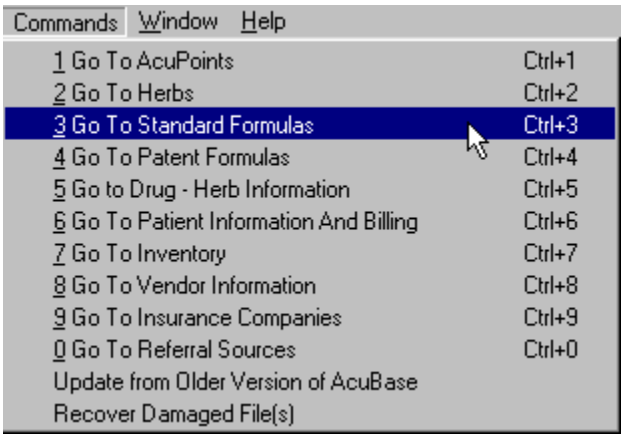
- Activate electronic billing.

- Set up a password entry system to protect your data and the privacy of your patients' personal information.

Using the Main Menu Buttons

To access any of the features of , simply click on the button related to the function from the Main Menu. Quitting out of any of the databases in AcuBase™ will bring you back to this Main Menu.

Using the Command Menu Shortcuts


Commands
Window
Help
1 Go To AcuPoints Ctrl+1
2 Go To Herbs Ctrl+2
3 Go To Standard Formulas Ctrl+3
4 Go To Patent Formulas Ctrl+4
5 Go to Drug - Herb Information Ctrl+5
6 Go To Patient Information And Billing Ctrl+6
7 Go To Inventory Ctrl+7
8 Go To Vendor Information Ctrl+8
9 Go To Insurance Companies Ctrl+9
0 Go To Referral Sources Ctrl+0
Update from Older Version of AcuBase
Recover Damaged File(s)

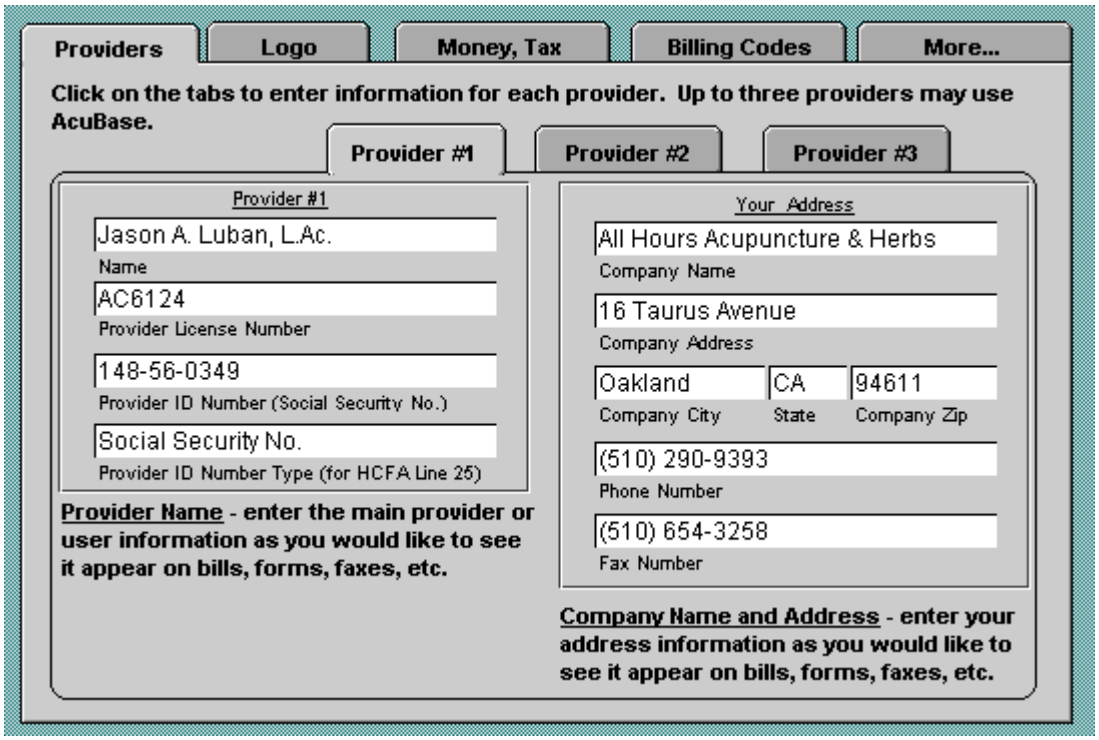
Each database in AcuBase™ has keyboard shortcuts for faster movement through common areas of the program without the use of the mouse. In any given area of the program, go to the "Commands" menu to view available keyboard shortcuts. PC users combine the "Ctrl" button with the number next to each command shown; Mac users combine the Apple/Command button with the number. In the Main Menu, rather than clicking on buttons related to each area of the program you would like to go to, you may use the Command Menu keyboard shortcuts.

Setting and Changing the Preferences in AcuBase

From the Main Menu, click on the "Preferences" button to access and modify settings that are used throughout AcuBase™. You should set these preferences before you use the program extensively! Click on the tabs (Address, Logo, Money/Tax, Billing Codes, or More…) to access each respective category of settings. Note that these preferences take effect from the time that you make them. So, for example, if you had already created invoices or entered items into inventory before you changed the tax preferences, those invoices and/or inventory items would retain the old tax rates that existed at the time those records were created. This goes for virtually all settings within Preferences.

Providers

Use the Providers tab to enter up to three user names and related contact information. Provider license number and tax id numbers may also be entered here. This information will be used when creating activity records and invoices. If you plan to do electronic billing, you should avoid using in any of these fields (so "Jason Luban, MD, Ph.D" should instead be entered as "Jason Luban MD Ph.D". See the Electronic Billing section of the user's manual for further details on why commas are evil.).



The Provider ID Number Type field refers to the type of ID number being used. This field also determines which box is checked on Line 25 of the HCFA 1500 form.

Important Note: Be sure that you have entered provider information here before you begin entering patient information. The first thing you will enter in a patient record is the provider assigned to that patient. If the provider preferences were not entered before the patient was put into the database, provider information will not show up in box 33 of the HCFA 1500 form. You will have to go back and reassign the correct provider to each patient in the database to fix this (and/or use the "Replace All" feature, discussed in the last chapter).

Logo

The Logo preference allows the user to place their own logos into AcuBase™. The first logo field (Letter Logo) is for the logo that will be used on all forms that AcuBase™ creates for you.

The second Logo field is the logo that will appear throughout the AcuBase screens. Most companies/clinics will have the same logo in both logo fields.

The easiest way to place a logo in these fields is to open your logo in another graphics program and copy it there. Once it is copied, switch back to AcuBase™ and literally click in the logo fields and select "Paste" from the Edit menu. To simply delete the Trigram logo or any other, click on the logo field and hit delete or backspace on your keyboard.

Note that AcuBase™ may reshape logos to some extent in order to have them fit properly on screens and superbills.

Money / Tax

The Money / Tax tab is where you customize information related to currency and taxes. Click on the currency field to select the currency symbol you will use throughout the database (dollars, yen, pounds, etc.). This field allows users who do business in countries outside of the United States to have AcuBase™ use their currency. To change to a different currency, simply click on the Currency Symbol field to get a pop-up list. The default list includes currency symbols for the U.S. dollar, the British pound, the French franc, the German mark, and the Japanese yen. If you need to use any other currency that is not included on the default list, you can add to this pop-up list by going to the bottom of the list and selecting "Edit…"

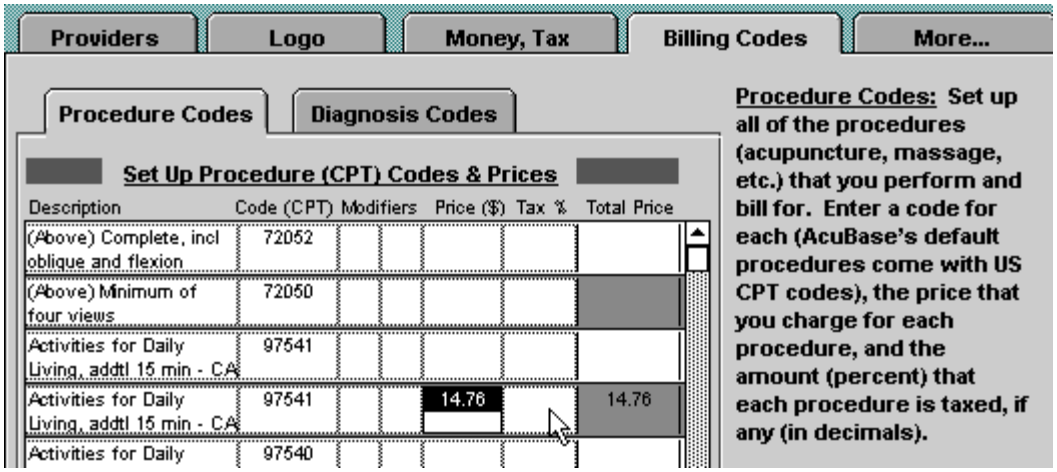
The Products Tax and Procedures Tax fields allow you to set default tax amounts for products and services that you provide, and will show up in both the inventory database and on invoices, respectively. Note that taxes on each product and service may be changed within each record, as well. Tax percentages must be entered in decimals. So, if your products are taxed at 5%, you would type ".05" rather than simply "5." Note, too, that, while a Products tax rate may automatically be entered when adding a new item to inventory, if the tax rate is later changed, it will not change the tax rate on previously entered inventory items. These items will need to be changed manually.

If the tax rate you charge for products changes, you may change the rate in the Products Tax field, and then automatically assign that new rate to all existing inventory without having to change each item manually in the inventory database. To do this, once you have changed the Products Tax field to the new rate, click next to the field where it says, "Click here to apply a new tax amount to all existing inventory."

Billing Codes

The Billing Codes tab gives you access to both procedure and diagnosis codes. These are the lists that pop up when using the Patient Information and Billing databases.

AcuBase™ comes with many of the most popular procedures and diagnoses requested by our users, with associated U.S. CPT and ICD-9 codes. You can simply click into any of the procedures or diagnoses listed to change or delete them, as well as adding modifiers, prices, tax amounts (%) for each procedure, and your own codes. To create new procedures or diagnoses, simply scroll to the bottom of the list and enter them on the last, blank line. Note that the lists will automatically alphabetize as soon as you click outside of them.


Providers
Logo
Money, Tax
Billing Codes
More...
Procedure Codes
Diagnosis Codes
Set Up Procedure (CPT) Codes & Prices
Description
Code (CPT)
Modifiers
Price ($)
Tax %
Total Price
(Above) Complete, incl oblique and flexion
72052
(Above) Minimum of four views
72050
Activities for Daily Living, addtl 15 min - CA
97541
Activities for Daily Living, addtl 15 min - CA
97541
14.76
14.76
Activities for Daily
97540
Procedure Codes: Set up all of the procedures (acupuncture, massage, etc.) that you perform and bill for. Enter a code for each (AcuBase's default procedures come with US CPT codes), the price that you charge for each procedure, and the amount (percent) that each procedure is taxed, if any (in decimals).

If you wish to print a list of all of your procedure or diagnosis codes, click on the pink button labeled "CLICK HERE to print codes" at the bottom-right side of the screen.

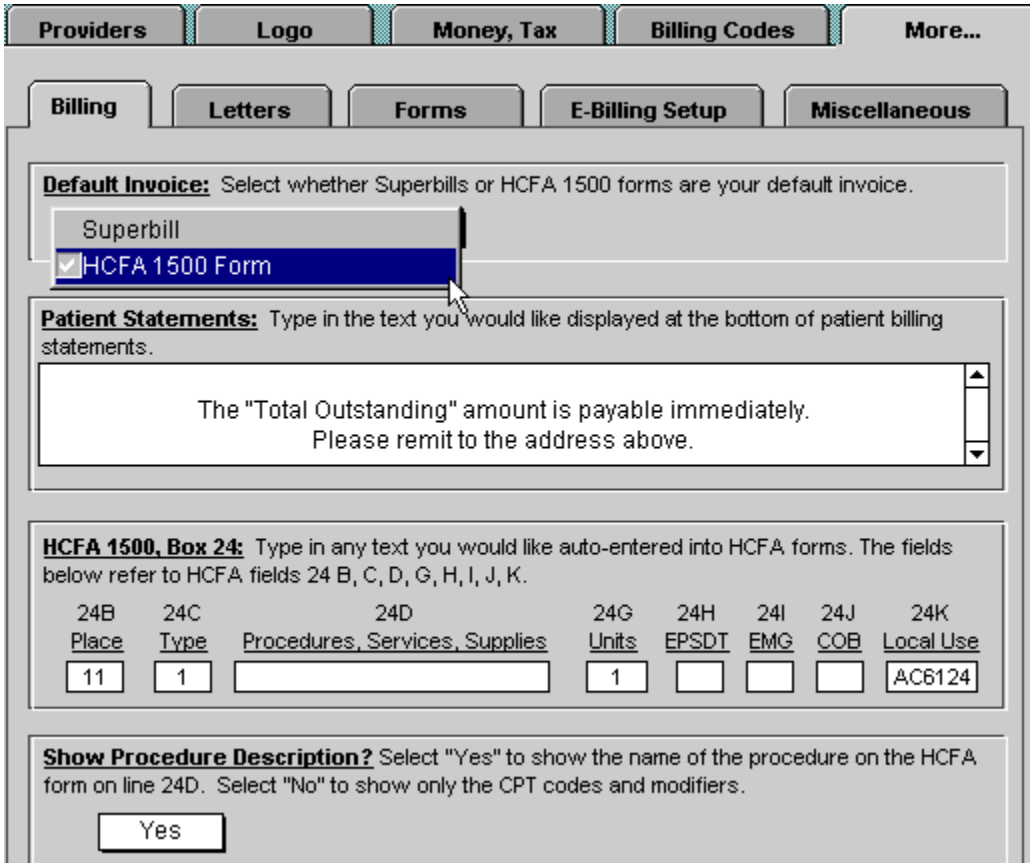
To delete a whole line (a code or diagnosis), or a blank line, see the "Deleting Records" section in Chapter 2.

More…

The More… tab has several subtabs:

Billing: The Billing tab has several options for customizing the way you interact with AcuBase™.

The Default Invoice option allows you to select whether you tend to print general superbills or HCFA 1500 forms most frequently, and adjusts the inner program defaults accordingly.

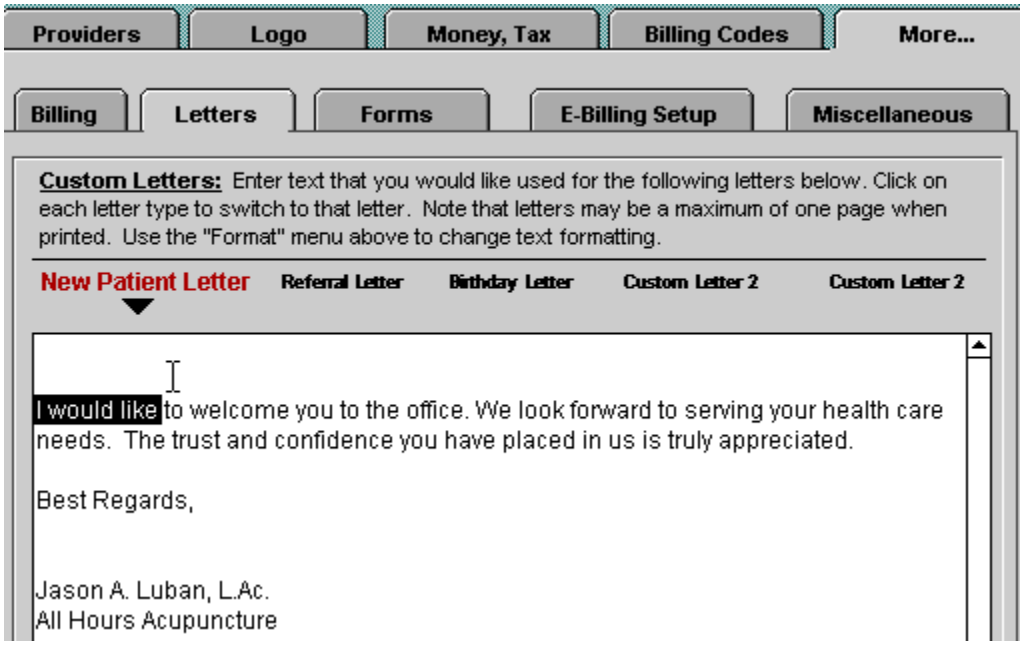

Providers
Logo
Money, Tax
Billing Codes
More...
Billing
Letters
Forms
E-Billing Setup
Miscellaneous
Default Invoice: Select whether Superbills or HCFA 1500 forms are your default invoice.
Superbill
HCFA 1500 Form
Patient Statements: Type in the text you would like displayed at the bottom of patient billing statements.
The "Total Outstanding" amount is payable immediately.
Please remit to the address above.
HCFA 1500, Box 24: Type in any text you would like auto-entered into HCFA forms. The fields below refer to HCFA fields 24 B, C, D, G, H, I, J, K.
24B Place
24C Type
24D Procedures, Services, Supplies
24G Units
24H EPSDT
24I EMG
24J COB
24K Local Use
11
1
1
AC6124
Show Procedure Description? Select "Yes" to show the name of the procedure on the HCFA form on line 24D. Select "No" to show only the CPT codes and modifiers.
Yes

The Patient Statements option allows you to change the message that appears at the bottom of statements you may send to your patients.

The HCFA 1500, Box 24 options allow you to enter default information that will automatically appear on each line of the HCFA invoice upon entering the dates of service. Though you may have parts of your invoice auto-entered, you can still change those fields on each invoice if you wish.

Show Procedures Description allows you to choose whether or not you wish to print the name of each procedure onto your HCFA forms on line 24 D (when set to "Yes"). When set to "No," only the CPT code and modifiers are printed there.

Letters: The Letters tab allows you to customize five letters in the program: A New Patient letter; a Referral letter; a Birthday letter; and two custom letters of you choosing. Simply click on the name of the letter to go to the preferences for that letter. Note that when you change the name of your custom letters, the name you have chosen becomes the name of the letter throughout the program. Each letter may not exceed one page in length when printed.

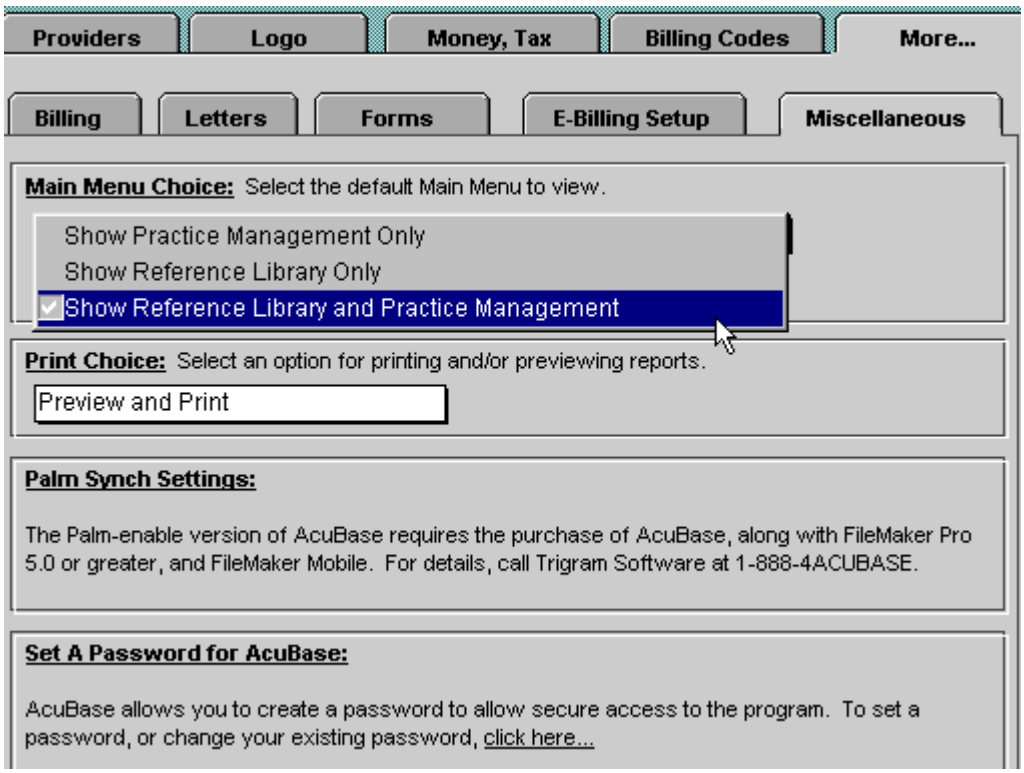

Providers
Logo
Money, Tax
Billing Codes
More...
Billing
Letters
Forms
E-Billing Setup
Miscellaneous
Custom Letters: Enter text that you would like used for the following letters below. Click on each letter type to switch to that letter. Note that letters may be a maximum of one page when printed. Use the "Format" menu above to change text formatting.
New Patient Letter
Referral Letter
Birthday Letter
Custom Letter 2
Custom Letter 2
I would like to welcome you to the office. We look forward to serving your health care needs. The trust and confidence you have placed in us is truly appreciated.
Best Regards,
Jason A. Luban, L.Ac.
All Hours Acupuncture

Forms: The Forms tab allows you to customize the three patient-specific forms in the database. These forms are accessed from the Intakes / Activities tab of each patient's file. To change the name of each form, click and change the "Name of this form" field. The default information entered into each form can also be changed by clicking in the form and changing what you wish. You may also create and name one custom form.

E-Billing Setup: This tab is accessed when you wish to use the electronic billing capabilities of AcuBase™, and you will set E-billing to "On" when you are ready to do electronic billing. If you are interested in using electronic billing, please follow the instructions in the Electronic Billing section of this user's manual.

Miscellaneous: This tab, of course, contains several random settings that don't have anywhere else to live.

The first setting, Main Menu Choice, is also set the first time you open AcuBase™. It gives you the choice of three Main Menus: one showing billing and practice management databases; one showing the oriental medicine reference library, and one (the default) showing both. You may also access and change these settings from the bottom of the Main Menu screen where it says, "To Change Your Main Menu Preference(s), click here.")

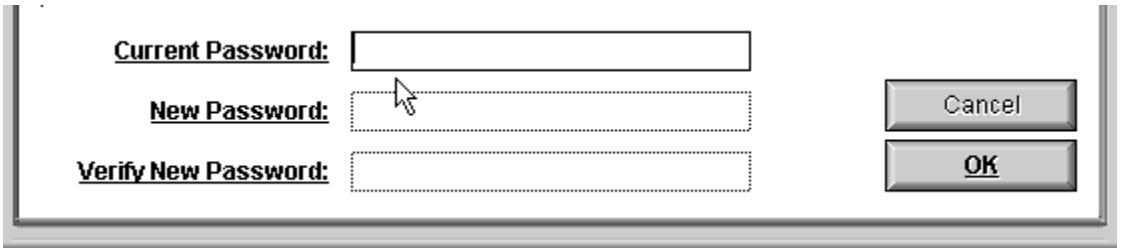

Providers
Logo
Money, Tax
Billing Codes
More...
Billing
Letters
Forms
E-Billing Setup
Miscellaneous
Main Menu Choice: Select the default Main Menu to view.
Show Practice Management Only
Show Reference Library Only
Show Reference Library and Practice Management
Print Choice: Select an option for printing and/or previewing reports.
Preview and Print
Palm Synch Settings:
The Palm-enable version of AcuBase requires the purchase of AcuBase, along with FileMaker Pro 5.0 or greater, and FileMaker Mobile. For details, call Trigram Software at 1-888-4ACUBASE.
Set A Password for AcuBase:
AcuBase allows you to create a password to allow secure access to the program. To set a password, or change your existing password, click here...

The Print Choice field allows you to choose whether or not you see a preview before you print anything out of AcuBase™. You may choose to have AcuBase™ give you a preview before you print anything; print without a preview; or preview but not actually print.

Palm Synch Settings refers to the fact that certain aspects of the databases in AcuBase™ may also be synchronized and viewed on handheld devices running the Palm operating system. For more information on this feature, see the Palm-related questions in *Appendix A: Frequently Asked Questions*.

Set a Password for AcuBase, like the Main Menu Choice above it, gives you a choice of setting a password the first time you open the program. By default, the password is set to be blank, meaning that you do not need a password to use the program. Whether or not you currently have a password set to restrict access to your AcuBase™ database, you can always return to this part of the Preferences to change your password, add a new one, and/or get rid of all passwords altogether.

When you click on this option, you will be taken to the "Choosing A Password" window. You will first enter your existing password to verify that you have the rights necessary to change the master password. On the second line, you will enter your new password, and then on the third line, re-enter it to verify that you did not accidentally type an incorrect new password in the line above.

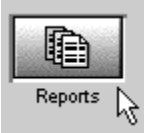


If you haven't used a password in AcuBase™ before, leave the "Current Password" field blank. If you currently have a password and wish to turn off the password entry altogether, enter your current password, and leave both the New Password and Verify New Password fields blank.

When your new password has been accepted, click "OK" to continue. You will then be asked to verify that you know the database's password before you are allowed to continue. In this window, and whenever you open the password-protected program, you will have two chances to enter a correct password before the program closes again. You will only be asked for a password when the program opens, but may also be asked for one when leaving the Drug-Herbs database. Note that passwords, as they are entered, will show up as blank on the screen (you will not be able to see the text as you type it in). Passwords are not case-sensitive.

Note: If you choose to use a password and later forget it and/or get locked out of the program for any reason, Trigram Software will charge you a fee to unlock your program and reset the password to blank.

Accessing Reports From The Main Menu



A "Report" is a term used by AcuBase™ to describe any data which is printed from the database. Thus a report may be a patient phone book, mailing labels of insurance company addresses, envelopes, or a true report of income versus expenses related to your practice. This screen allows you to access frequently printed reports related to billing, inventory, and office management directly from the Main Menu. Click on the appropriate tab to access billing- and inventory-related reports.

Note that all reports in AcuBase™ may be run from within the specific database to which they refer (i.e., Billing reports can be run from the Reports layout within the Patient Information & Billing database; Inventory reports can be run from the Reports layout within the Inventory database; etc.). On some machines, after you have selected and run a report from this screen, you will be left at the Reports window within that database. (For example, if you select a billing report, after the report is run, you may be left at the Reports window within the Patient Information and Billing database.) If you wish to return to this window to run further reports, simply return to the Main Menu and click on the Reports button.

There are many other reports in the AcuBase™ program which do not appear from the Main Menu's Reports button, and which should be accessed from the Reports button within the database you are looking for. This includes reports related to herbs, formulas, patent formulas, review questions, and drug-herb interactions from the Reference Library. Reports related to insurance companies and referral sources (such as mailing labels, phones books, etc.) should also be accessed from within those specific databases.

For more specific information on individual reports, check out the chapter associated with the reports. To get more information on the billing reports, for example, check out the Billing and Patient Information database chapter in this manual.

Getting Back to the Main Menu

Return to the Main Menu at any time, from any database, by simply clicking on the "Main Menu" button at the top of the screen. Attempting to open any AcuBase database directly without using the AcuBase program executable will also give you the option of returning to the Main Menu.

Chapter 4: Using The Patient Information & Billing Database

Patient Information & Billing Database Overview

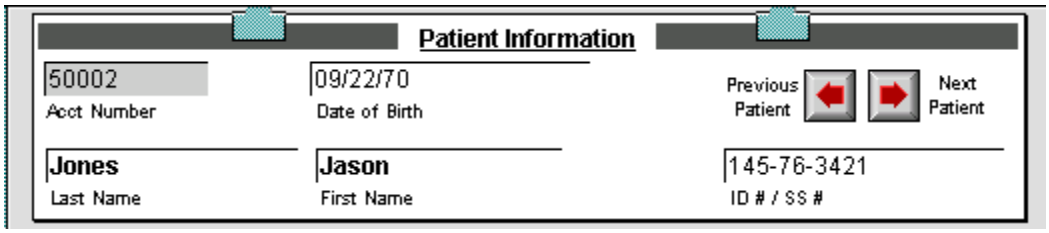
The Patient Information & Billing database was designed by medical professionals, for medical professionals. It integrates data from throughout AcuBase™, and includes great features such as:

- General and HCFA-specific patient data
- Patient medical information, with diagnosis pop-up screens that may be easily edited.
- An activity list that gives you access to the details of all patient-related activity—every phone call made, every fax sent, every intake taken, and even patient progress reports.
- Billing invoices that allow you to bill on a superbill or HCFA 1500 form, and to bill for products such as herbs and formulas, as well as services.
- HCFA 1500 form billing that includes: the ability to adjust the alignment of the HCFA form in small increments to ensure that your printer places the fields appropriately onto the form; line-item payments; a one-stop payment entry screen for each patient; and much more.
- Full integration with the rest of AcuBase™. Medical and billing information, clinic address information, diagnoses, procedures, prices, and even tax rates automatically flow through to superbills and activity records. Products sold to patients may appear in the Reference Library and are automatically taken out of your available inventory.
- Print reports related to your billing
- Context-sensitive help available from any screen.

Using the Patient Information & Billing Database

Upon clicking the Patient Information & Billing database icon from the Main Menu, you are taken directly to "View As List" mode, where patients are presented in alphabetical order. You may also view the provider name, patient phone numbers, payment type, and total balance due from this screen, and may sort by any one of these categories by simply clicking on the sort button found next to each of these fields' names. To get more details on a given patient's record, click on "View As Form" at the top of the screen, or click on the blue button to the left of each patient's name. This will take you to the first of four "Form Views" available in the Patient Information & Billing database. To go from one record to the next in Form View, simply click on the arrow buttons to go forward or backward. Context-sensitive help is available from every screen. Just look for the "?" button at the top and/or bottom of the screen.

Note that, on all Form View screens, the patient's ID number (assigned by the database), name, date of birth, and social security (or internal identification) number are provided at the top of each Form View screen. The patient ID number field is created by AcuBase™, but may be modified as long as it remains a unique number. Patient name, date of birth, and social security number may be modified from the Patient Information tab only.



The Four Form Views

Four separate tabs are shown in Form View to allow users to access different kinds of information about a given patient. As with any part of AcuBase™, you may use the Tab key on your keyboard to move from one field to the next. You may also switch from one screen to the next using the Commands menu and its associated keyboard shortcuts.

The Patient Information Tab

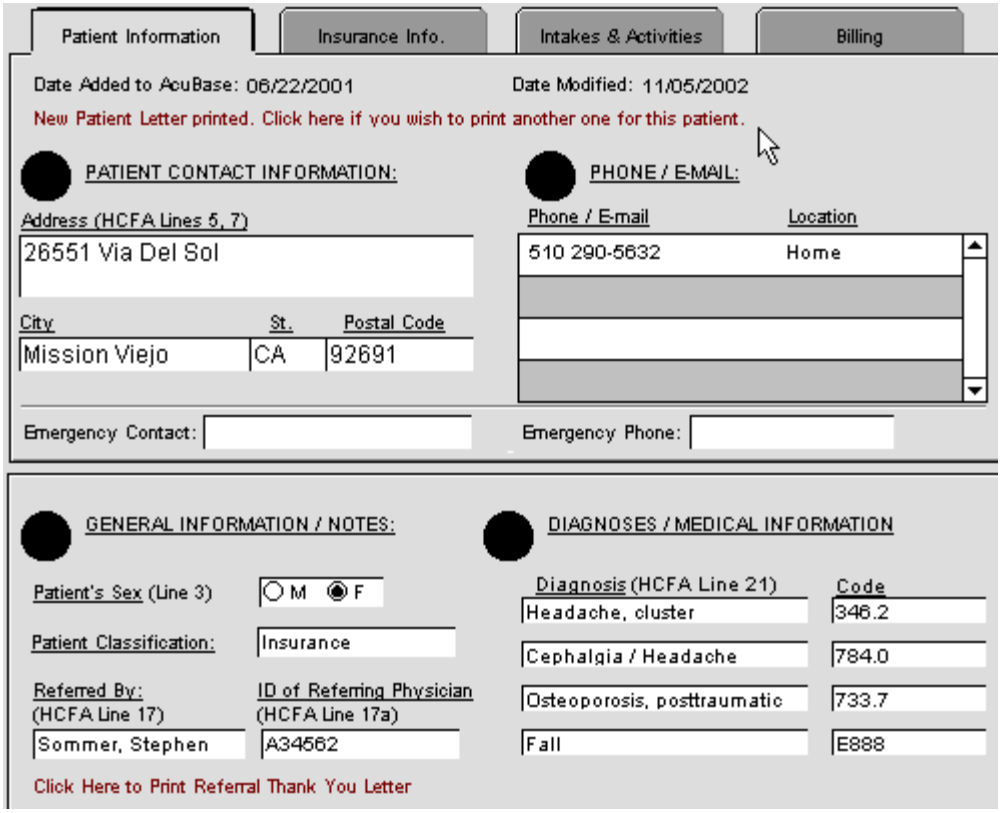
The first screen you see when entering a new patient or going to the "View As Form" screen for a given patient is the Patient Information screen, with the option of clicking on the Insurance Info tab, as well as the Activities and Billing tabs.

This is the default screen you will see when you enter a new patient or view data on an existing patient in your database. This screen is divided up into five major subsections:

Patient Contact Information, Phone/E-mail, General Information/Notes, Diagnoses/ Medical Information, and HCFA 1500 Preferences for This Patient.

As you tab through each field, start by entering the Provider, the Last Name, First Name, Date of Birth, and Social Security Number or other ID number of this patient. Note that the ID # / SS # field fills line 1a on the HCFA 1500 form. Note, too, that these fields may only be modified from this screen.

The date the patient record was added to AcuBase™, as well as the last date the patient record was modified in any way, shows below the four tabs and above the Patient Contact Information section. You are informed as to whether or not a New Patient Letter has been printed for this patient in a message that appears in red letters under these dates. Whether or not a letter has been printed, you may click on the message to print a letter. (New Patient letter settings are found under "Reports" under the "More…" tab of the Main Menu's Preferences button.)



From this point forward, you may note that many of the fields have titles that include a HCFA line number. This number refers to the box number on the HCFA 1500 form where the field data will appear.

Next, you will enter the patient's address, emergency contact info, and any phone numbers and/or email addresses. You may enter as many numbers or email addresses as you wish, and the list will show as you entered it (it will not alphabetize).

General Information

After that, you will tab down to the General Information section, where the patient's sex, classification, referrer information, and any general comments may be entered as they relate to this patient. The Patient Classification field allows you to classify your patients by their "type," i.e., Worker's Comp, Cash Paying, Insurance Paying, etc. You can edit these classifications by selecting "Edit…" at the bottom of the pop-up field's list, or just hitting the Esc key on your keyboard or click once in the field to type whatever you would like there. The Patient Classification field also appears in List View, and can be useful when finding appropriate patients for reports.

The Referred By field also pops up a list, in this case from the Referral Sources database. If you do not have any referrers listed there, or would like to enter one that is not on the list, simply hit the "Esc" key on your keyboard, or click once in the field. Like the New Patient Letter before it, you are informed as to whether or not a Referral Thank You Letter has been printed for this patient in a message that appears in red letters under the referral source. Whether or not a letter has been printed, you may click on the message to print a letter. (Referral Thank You letter settings are found under "Reports" under to More… tab of the Main Menu's Preferences button.). Note that the referrer must be in the Referral Sources database in order for the Referral Thank You letter to function properly.

The General Comments field is a memo field where you can write anything you like about the patient which is not applicable to any other fields in this section of the database.

Diagnoses/Medical Information

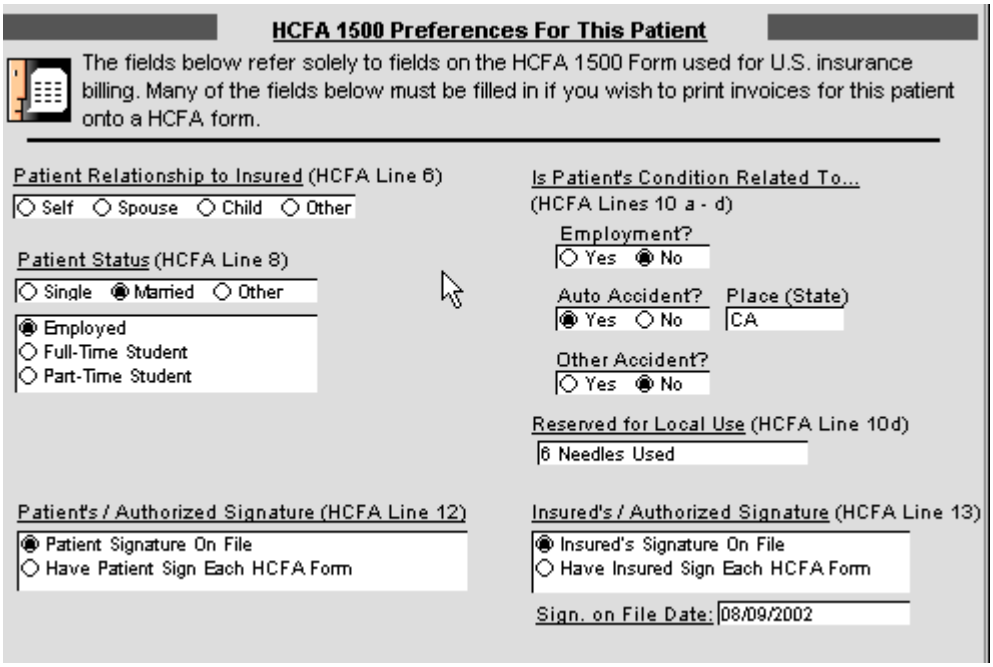
In the Diagnoses/Medical Information section, up to four diagnoses may be entered. These diagnoses will appear on superbills as well as on the HCFA 1500 form's line 21. Each diagnosis pops up with a list of the approximately 2,000 diagnoses provided from the Billing Codes tab of the Main Menu's Preferences button. The list is alphabetical by condition. When you select a condition, the corresponding U.S. ICD-9 code is automatically entered. You may skip through this list when it pops up by typing the first few characters of a given diagnosis. You may also hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other diagnosis which may not already be on the list. To add new diagnoses to the pop-up list, do so from the Billing Codes tab of the Main Menu's Preferences button. If the diagnosis

you want is not on the list, you may also double-click on the diagnosis field and put in your new diagnosis and code manually. Then, from that point forward, the new diagnosis will appear in the pop-up list (assuming you also gave it a unique code).

The Diagnoses section also provides a memo field, "Other Medical Information," where you may enter any other general medical information related to this patient. Note that Date of Illness / Injury fields (Lines 14 and 15 on the HCFA form) appear in the next section.

HCFA 1500 Preferences

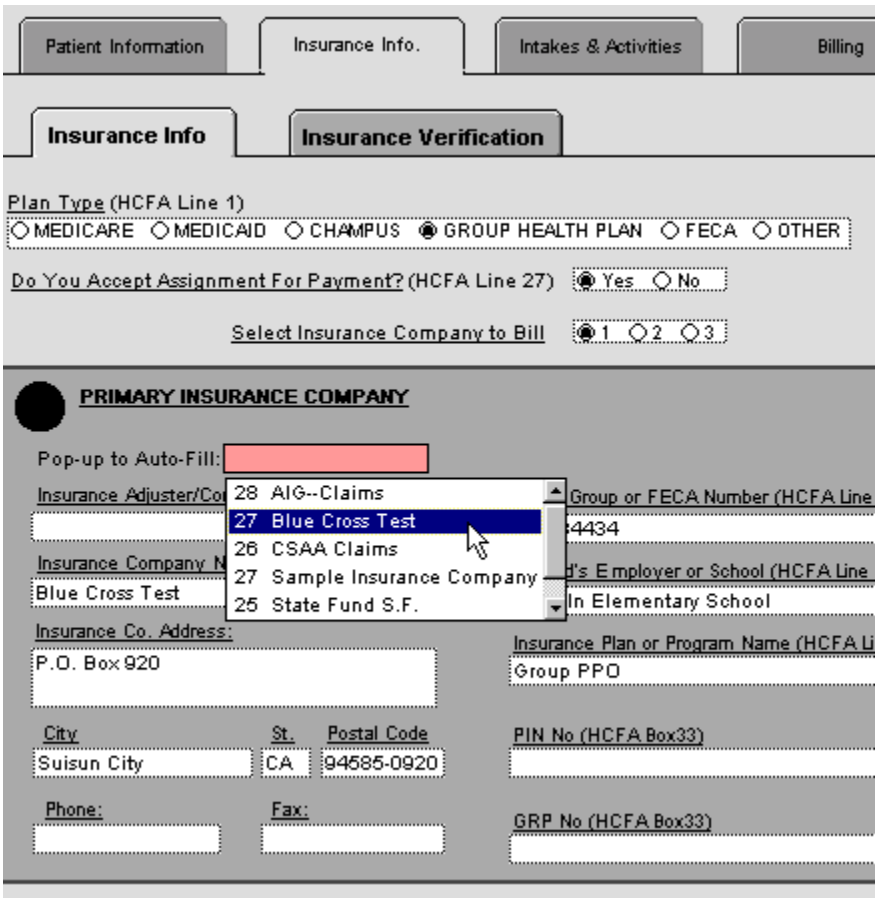
The fifth and final section on the Patient Information screen is the HCFA 1500 Preferences For This Patient. This screen may also be accessed from the Billing tab as the "HCFA Details" button; and from within each HCFA 1500 invoice onscreen as the "View Other HCFA Details For This Patient" button at the bottom of the screen. The fields on this part of the screen must be filled out in order to properly complete a HCFA 1500 form. Simply tab through each field, entering data as appropriate for the patient's HCFA form printing. Note that each field has an associated HCFA line number for easy reference. The large pink button at the bottom of this screen allows you to jump straight to the billing section of the HCFA forms via the AcuBase™ Billing tab. We recommend that you have information entered into the Insurance Info tab for each patient before you begin using the Billing tab.


HCFA 1500 Preferences For This Patient
The fields below refer solely to fields on the HCFA 1500 Form used for U.S. insurance billing. Many of the fields below must be filled in if you wish to print invoices for this patient onto a HCFA form.
Patient Relationship to Insured (HCFA Line 6)
Self Spouse Child Other
Patient Status (HCFA Line 8)
Single Married Other
Employed
Full-Time Student
Part-Time Student
Is Patient's Condition Related To...
(HCFA Lines 10 a - d)
Employment? Yes No
Auto Accident? Yes No
Place (State) CA
Other Accident? Yes No
Reserved for Local Use (HCFA Line 10d)
6 Needles Used
Patient's / Authorized Signature (HCFA Line 12)
Patient Signature On File
Have Patient Sign Each HCFA Form
Insured's / Authorized Signature (HCFA Line 13)
Insured's Signature On File
Have Insured Sign Each HCFA Form
Sign. on File Date: 08/09/2002

The Insurance Information Tab

The Insurance Information tab leads to the insurance information screen, where all insurance-related information is kept for a given patient. In this section, you will tab through and select several different fields that relate directly to the HCFA 1500 form. You may also select a sub-tab, "Insurance Verification," to enter information related to if and how the patient's insurance companies pay for your services.

AcuBase™ allows you to enter up to three different insurance companies for a given patient. In order to select which company to bill by default, simply select company number 1, 2, or 3 from the "Select Insurance Company to Bill" field. Note that, when you choose change an insurance company to bill (1, 2, or 3), the company chosen will be billed *from that point forward*. All previous invoices will retain the original insurance company information from before the change was made.



Within each "Insurance Company" section on this screen, you may click on the pink "Pop-up to Auto-Fill" button to select from a pop-up list of all companies you have pre-entered in your Insurance Companies database. If you do not have any companies listed there, or would like to enter one that is not on the list, simply hit the "Esc" key on your keyboard, or click once in the field to clear it, and then enter the insurance company information you would like.

Each insurance company information section also includes specific fields for that company's policy

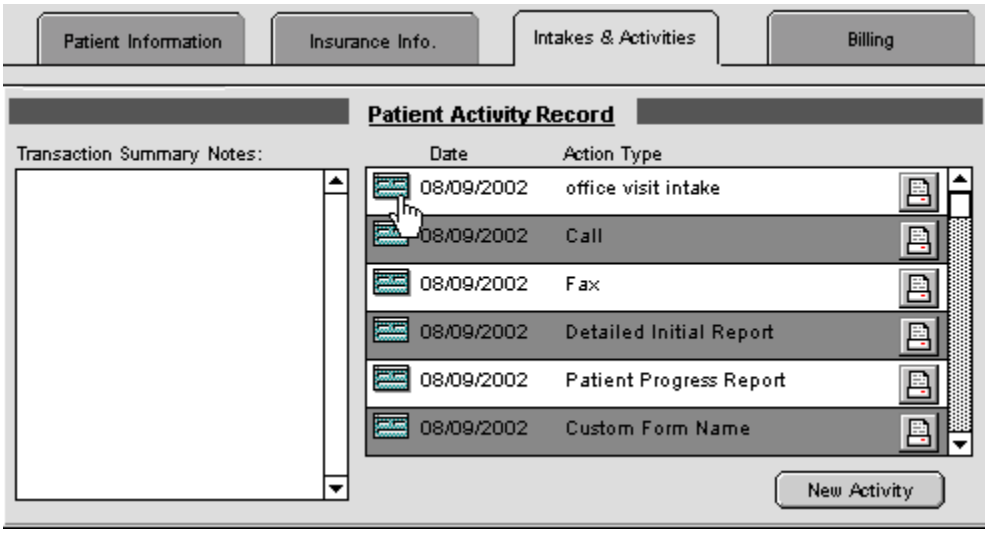
group number, the insured's employer, the provider's Pin or Group number. All of these fields have related HCFA line numbers to which they refer. If you do not plan on using a HCFA form for this patient or insurance company, you will not usually need to put data into these fields.

Insurance Verification Sub-Tab

The Insurance Verification tab within the Insurance Information section allows you to enter information related to if and how the patient's insurance companies pay for your services. Any information that does not fit the definition of the fields provided may also be entered in the Notes field. Three verification sections are offered in relation to the three possible insurance companies that a given patient may have on file.

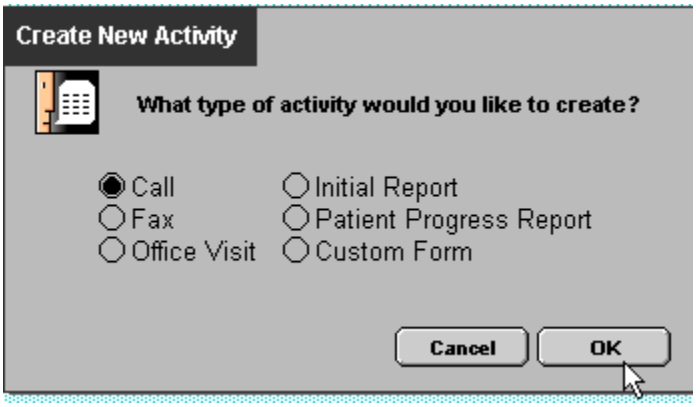
The Intakes & Activities Tab

The next major tab, the Intakes & Activities tab, allows you to view, enter, and print events, or activities, related to the patient. All activities are shown in list format in date order. Note that Activity entries of multiple pages may have up to two lines cut off at the bottom of the page depending upon what kind of printer you have. Most individual Activity entries will print up to 25 pages.



Creating New Activities Related to a Patient

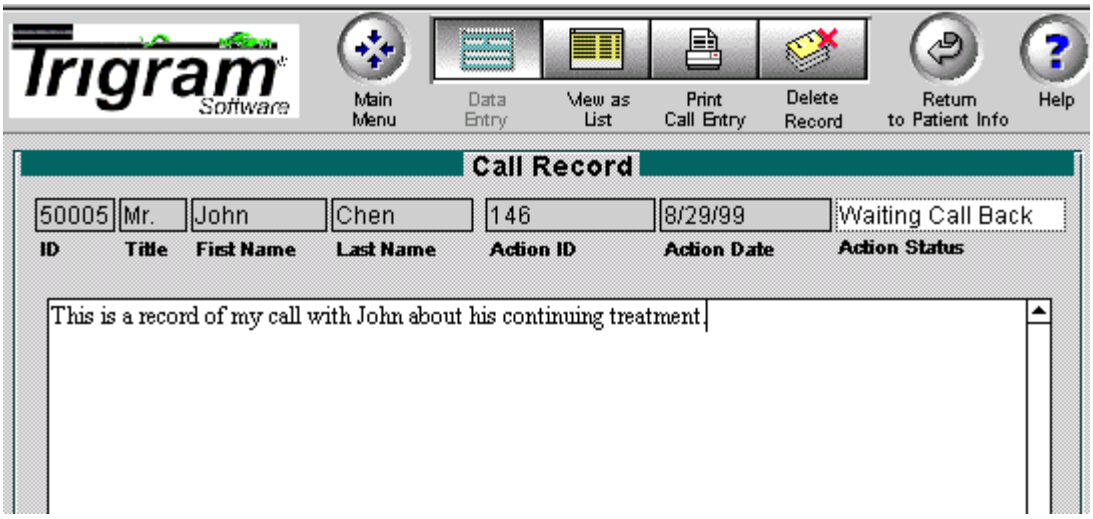
When you click on the New Activity button, you are presented with six choices of activities to create: a call record, a fax, an office visit (intake), an initial report, a patient progress report, or a custom form. For the office visit, initial report, and custom form, information may be auto-entered, and the name of the form may change, depending upon how you have set up your preferences from the Preferences section of the Main Menu (More… / Forms tab).



Click cancel to cancel the creation of a new activity record. (If you wish to change the look of any of the following activities, see the "To Change The Look Of Invoices Or Activities" section later in this Chapter.)

Call Record

If you choose to create a call record, you will be presented with the Call Record screen. The contact's ID, name, and the date that the action record (the call record) was created are automatically entered for you. You can click on the Action Status field to display a list



of the status of this call (whether the call is open, closed, in process, etc.). You may edit this status list and add your own choices by clicking on the Action Status field and selecting "edit…" Enter all the information you would like to about this call in the Notes field. When you are finished, you may print the call record by clicking on the Print Call Entry button; you may choose to list all of the other activities related to this patient by clicking on the View As List button; you may choose to return to the Patient Information & Billing database; or you may return to the AcuBase™ Main Menu.

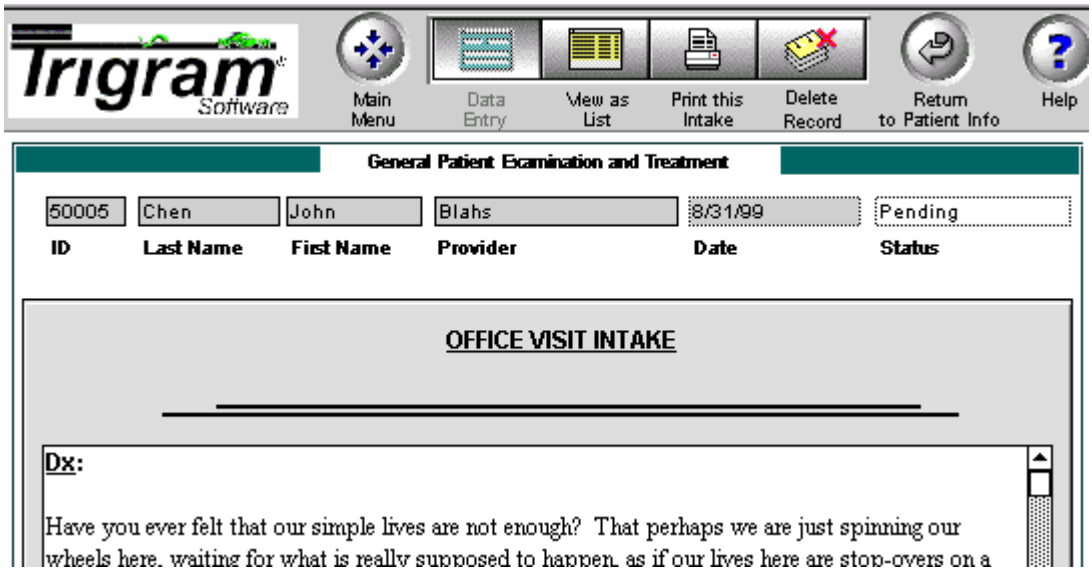
Fax Entry

If you choose to create a fax, you will be presented with the Fax Entry screen. On this screen, all you need to do is enter who the fax is going to, who it is from into the From field, and type in any message that you want to have appear on the cover sheet in the Fax Message field.

You may print the fax by clicking on the Print Fax button; you may choose to list all of the other activities related to this patient by clicking on the View As List button; you may choose to return to the Patient Information & Billing database; or you may return to the AcuBase™ Main Menu.

Office Visit

If you choose Office Visit, you will be presented with the Office Visit Intake screen. On this screen, you have an unlimited amount of space to write as much as you would like to about a given patient intake. The patient's name, provider, today's date, and the status of



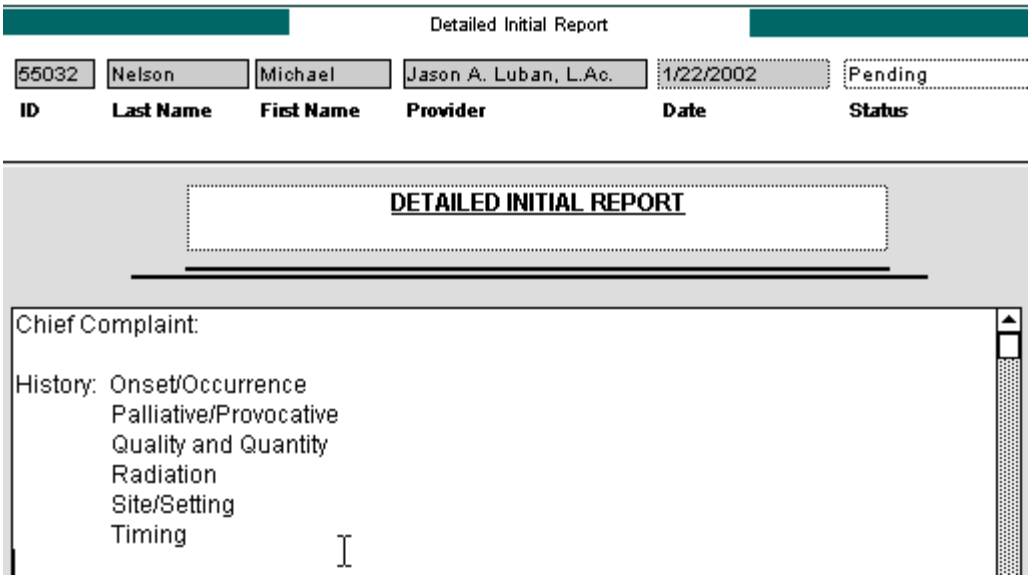
the intake may be viewed at the top of the screen. You may change the date or the status. The auto-entered information, as well as the title of this form ("Office Visit Intake" by default) may be edited from the "More.. / Forms" tab of the AcuBase™ Main Menu's Preferences.

As with any part of AcuBase™, you may change fonts, font sizes, alignment of text, etc. from the Format menu. You may print the office visit by clicking on the "Print this Intake" button; you may choose to list all of the other activities related to this patient by clicking on the View As List button; you may choose to return to the Patient Information & Billing database; or you may return to the AcuBase™ Main Menu..

Initial Report

If you choose Initial Report, you will be presented with the Detailed Initial Report screen. This is the form you may use for the a more detailed initial or follow-up consult with a patient. The auto-entered information, as well as the title of this form ("Detailed Initial Report" by default) may be edited from the "More.. / Forms" tab of the AcuBase™ Main Menu's Preferences.

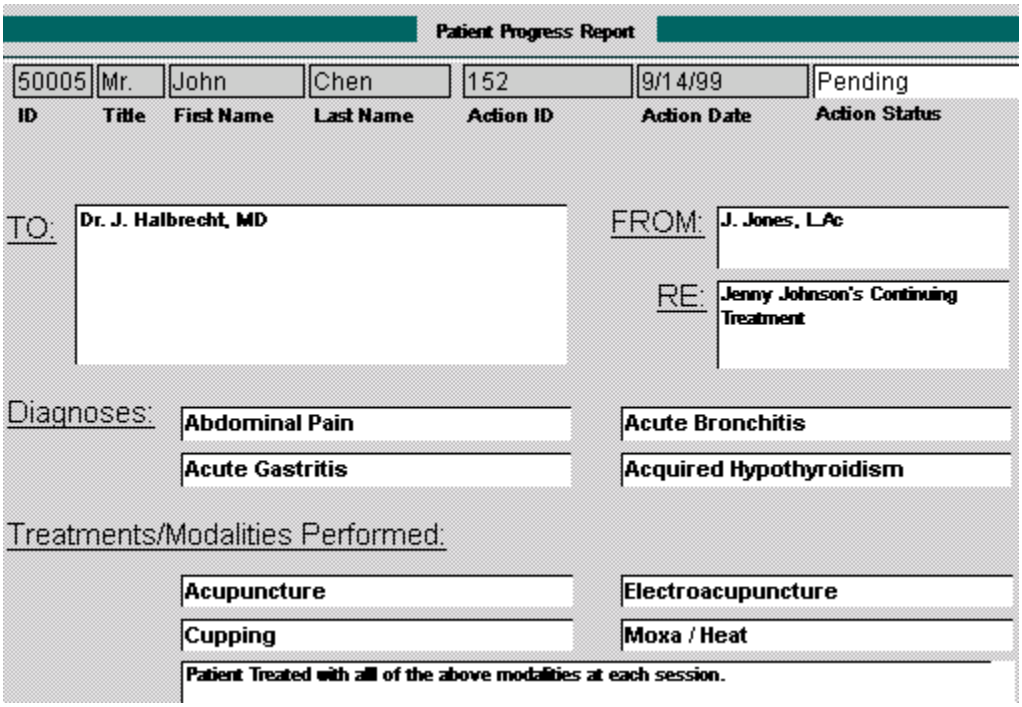
As with any part of AcuBase™, you may change fonts, font sizes, alignment of text, etc. from the Format menu. You may print the office visit by clicking on the "Print this Intake" button; you may choose to list all of the other activities related to this patient by clicking on the View As List button; you may choose to return to the Patient Information & Billing database; or you may return to the AcuBase™ Main Menu.



Patient Progress Report

If you choose Patient Progress Report, you will be presented with the Patient Progress Report entry screen. The Patient Progress Report is intended to be used as a form that you may send to insurance companies or to the practitioner who may have referred this patient. On this screen, you may tab through each field and enter relevant information. Several pop-up menus appear, all of which may be edited by going to the "Edit…" option at the bottom of any given pop-up list. Diagnoses are automatically entered from your entries in the Medical Information tab, but may also be changed.

When you are done entering data in the Patient Progress Report entry screen, you may print the report by clicking on the "Print" button; you may choose to list all of the other activities related to this patient by clicking on the View As List button; you may choose to return to the Patient Information & Billing database; or you may return to the AcuBase™ Main Menu.



Custom Form

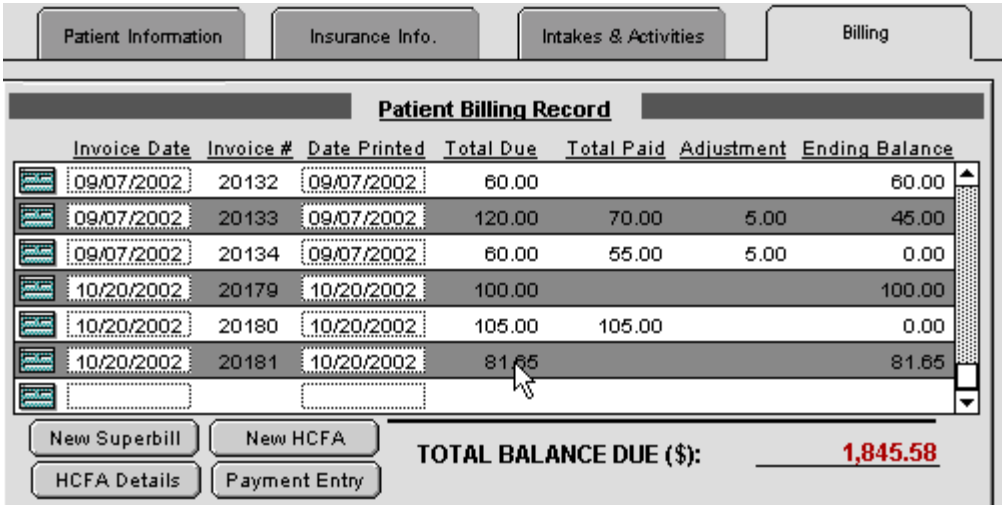
If you choose Custom Form, you will be presented with the Custom Form screen. This form may initially be customized by you from the "More.. / Forms" tab of the AcuBase™ Main Menu's Preferences.

As with any part of AcuBase™, you may change fonts, font sizes, alignment of text, etc. from the Format menu. You may print the office visit by clicking on the "Print this Intake" button; you may choose to list all of the other activities related to this patient by clicking on the View As List button; you may choose to return to the Patient Information & Billing database; or you may return to the AcuBase™ Main Menu..

The Billing Tab

The fourth tab in the Patient Information & Billing database is the Billing tab. Upon clicking on this tab, you are taken to the Patient Billing Record, a summary list sorted by date of all of this patient's invoices. You may view the date of the invoice (HCFA or "Superbill"), the invoice number, the last date the invoice was printed, the total amount of the invoice, the amount paid, the amount adjusted, and the ending balance for each invoice (if any). The sum of all outstanding invoice totals may be seen at the bottom of the screen in red type ("Total Balance Due"). To get details on any given invoice, simply click on the button to the left of the invoice date.

Using the buttons on the bottom of the screen, as you can see, you may create a new Superbill invoice, a new HCFA 1500 form invoice, align the HCFA 1500 form for your printer, or go to a Payment Entry screen. Note, too, that, by clicking on the blue button to



the left of any previous billing transaction, you will be taken directly to that transaction/ invoice. If you click on a blue box next to a blank line (a blank line will always appear at the bottom of the Patient Billing Record list), you will be given a new, blank Superbill or HCFA invoice to fill out. When clicking on this button, whether you go directly to a Superbill or HCFA-related screen is determined by the preferences you set up in the "More…" tab from the Preferences button on the Main Menu. If you had set the Default Invoice field to "Superbill", you will automatically go to a superbill screen. If you set the field to "HCFA 1500 Form", you will go to a HCFA form. Either way, from either a superbill or HCFA invoice screen, you can switch from one to the other by clicking the appropriate button at the top of the invoice your are looking at.

Creating New Superbills

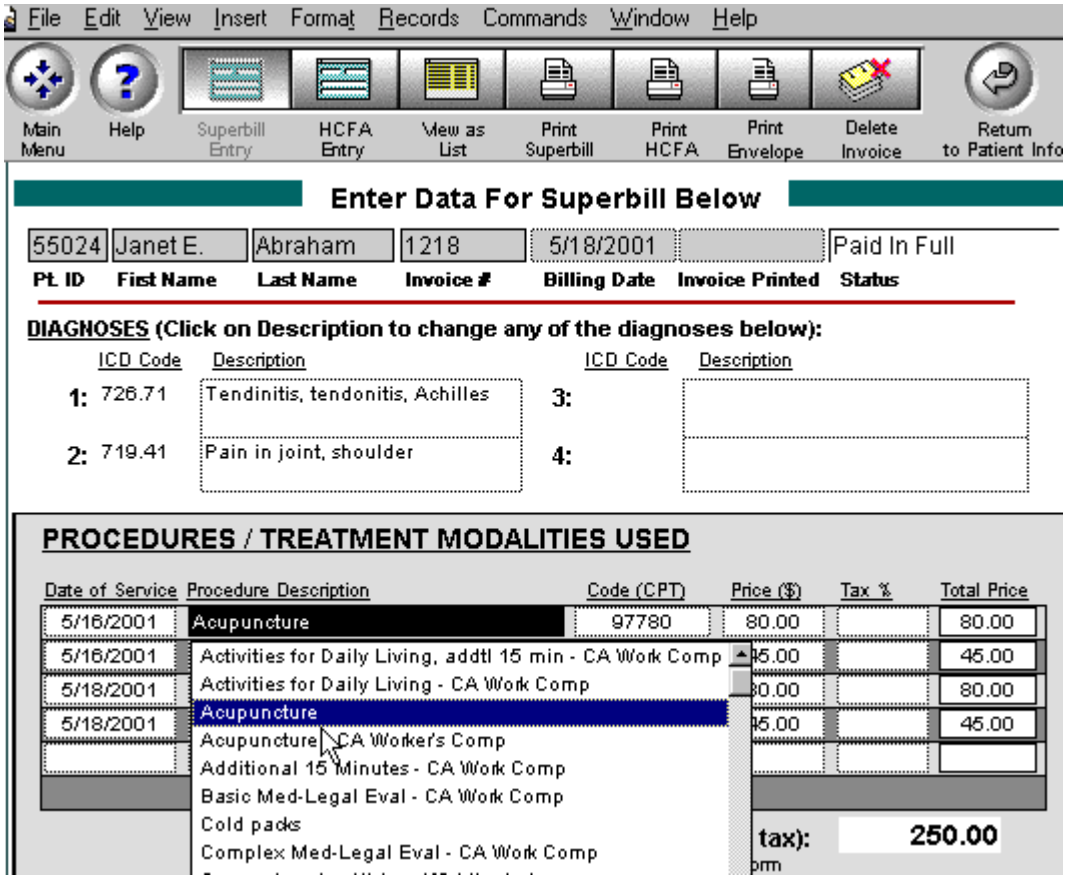
To create a new superbill, click on the "New Superbill" button at the bottom of the screen. This will take you to the Superbill Entry window. At the top of the screen, you will see that the patient's name, invoice number, and the billing date (today's date) have already been entered. Only the date field may be modified. The Date Printed field is filled in each time you print the invoice. The Status field returns values of "Paid In Full" or "Balance Due" depending on the payment status of the invoice. Tab through the fields to enter data.

The first section of the superbill is the Diagnoses section. Up to four diagnoses should already be entered here from the diagnoses you had previously entered in the Diagnoses section of the Patient Information screen. Whether or not data is entered here, you may click on the Description field next to each number (1 to 4) to see a pop-up list of diagnoses in the database. Each diagnosis field pops up with a list of the close to 2,000 diagnoses provided from the Billing Codes tab of the Main Menu's Preferences button. The list is alphabetical by condition. When you select a condition, the corresponding ICD-9 code is automatically entered. You may skip through this list when it pops up by typing the first few characters of a given diagnosis. You may also hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other diagnosis which may not already be on the list. To add new diagnoses to the pop-up list, do so from the Billing Codes tab of the Main Menu's Preferences button.

Next is the Procedures / Treatment Modalities Used section. You may enter up to six treatments here. Enter the date of each procedure. When you tab over to the Procedure Description field, you will see a pop-up list taken from the Procedures list in the AcuBase™ Main Menu Preferences. Click on the appropriate procedure, and it's code, price, and taxed amount (if any) will auto-fill. Like the Diagnoses pop-ups above, the list of procedures is alphabetical. When you select a procedure, the corresponding CPT code, if any, is automatically entered, along with any price or tax you have set up. You may skip through this list when it pops up by typing the first few characters of a given procedure. You may also hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other procedure which may not already

be on the list. To add new procedures to the pop-up list, do so from the Billing Codes tab of the Main Menu's Preferences button.

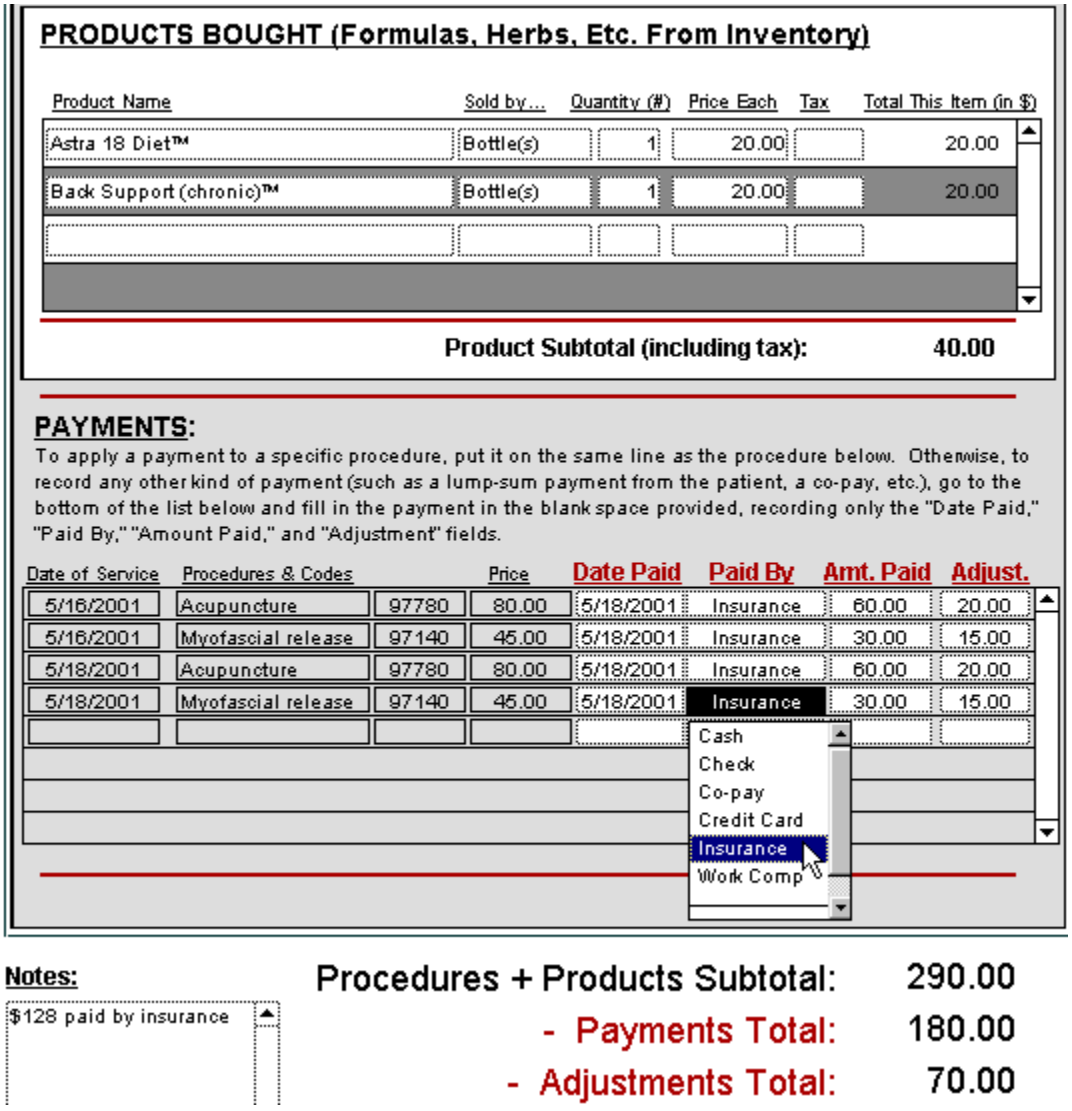
If you tend to use the same procedure on virtually every invoice, you may set AcuBase™ up to auto-enter it into each new invoice (superbill or HCFA). This can be done from the "More…" tab of the Main Menu's Preferences button, under the "HCFA 1500, Box 24" field. (If you do not use HCFA forms, just fill in the Box 24D preference.)



The next section, Products Bought, is for products that are sold to patients. Click on the Product Name field to see a pop-up list of all available products in the Inventory database. Select the one you want to auto-fill the other fields, and enter the amount (quantity) for each item. You may skip through this list when it pops up by typing the first few characters of a given product. You may also hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other product which may not already be in inventory. To add new products to the pop-up list, do so from the Inventory database. You may also change the price of a given item, even when

the price you have in Inventory for the item has already populated the "price" field, by simply clicking on the price and changing it.

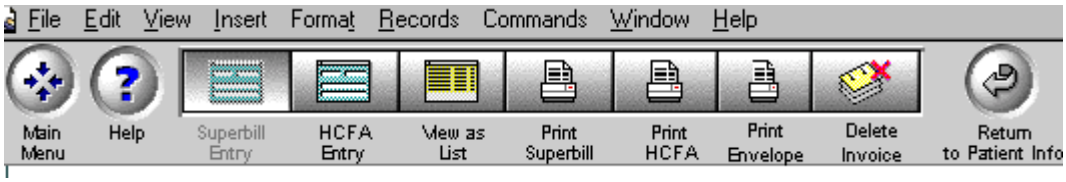
(Note that your "amounts" for each item must be consistent with the measurements used in the Inventory database. For example, if you buy an herb by the pound, and then sell some of that herb to a patient, it is assumed that you are selling it by the pound! This is the only way that AcuBase™ can accurately keep track of how much of a given item you have sold since last stocking it in inventory.)



The Payments section allows you to keep track of anywhere from one to several payments made to the invoice. To apply a payment to a specific procedure, put it on the same line as the procedure. Otherwise, to record any other kind of payment (such as a lump-sum payment from the patient, a co-pay, etc.), go to the bottom of the list and fill in the payment in the blank space provided below the last procedure, recording only the "Date Paid," "Paid By," "Amount Paid," and "Adjustment" fields. The "Paid By" field is a modifiable pop-up list intended to record the method or source of payment. You may select something from the list, or hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter whatever you like. To add new items to the pop-up list, scroll to the bottom of the list and select "Edit…" If the amount paid is lower than the actual amount of the procedure, use the "Adjustment" field if you wish to write off the difference. For instance, if you charged an insurance company $45 for myofascial release, but they only paid $35, you may wish to simply write off the $10 difference, in which case you would enter "10" in the "Adjustment" field. You may also have AcuBase™ do the adjustment calculation for you. After you have entered the amount paid for a given procedure, if it is less than the price charged, you can tab or click into the "Adjustment" field and click on the word "Adjustment;" go to the Commands menu and click on "Auto-Calc Adjustment for this Line-Item"; or simply use the keyboard shortcut: Cntrl+0 in Windows, or Command+0 on a Macintosh.

The final field on the Superbill Entry screen is the Notes field. Enter any notes that would like to have attached to this invoice. This field does not show up on the printed invoice.

When you are ready to print the invoice, click on the "Print Superbill" button at the top of the screen. This will take you to a preview of the invoice, which will include your clinic name and logo (from the Main Menu Preferences' Logo tab); an invoice number; patient address and insurance information; diagnoses (from the Patient Information database); the procedures and products you billed for; the monetary totals; and a line at the bottom of the page for your signature. Note that you are limited to printing 15 products on the invoice.



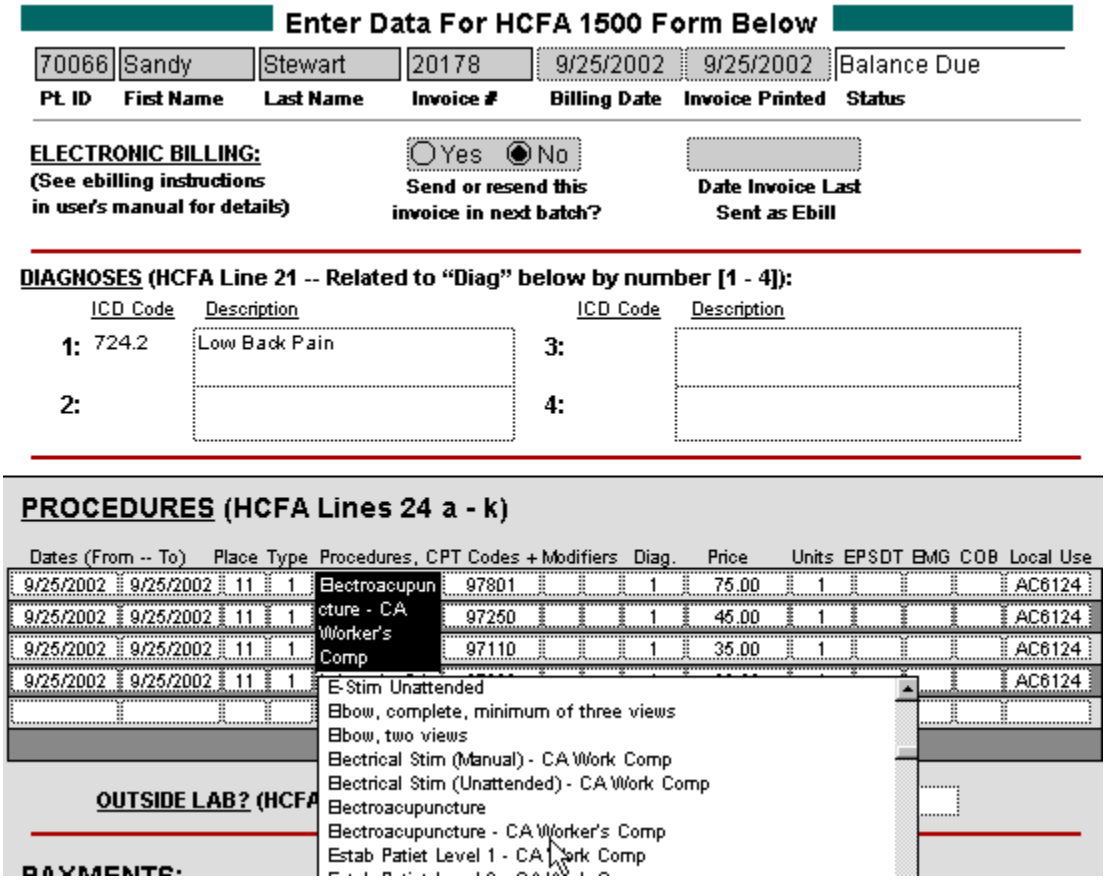
The buttons at the top of the Superbill entry screen allow you to: List all of the other invoices related to this patient by clicking on the View As List button; may switch to the HCFA Entry screen for this invoice; print this invoice onto a HCFA form; print an envelope to the insurance company related to this invoice; delete the invoice; return to the Patient Information & Billing database; or return to the AcuBase™ Main Menu.

Creating A New HCFA Form Entry

To create a new HCFA entry, go to the Billing tab within the Patient Information and Billing database for any given patient. Click on the "New HCFA" button at the bottom of the Billing Information screen. This will take you to a new screen which allows you to enter data for the current treatment(s).

At the top of the screen, you will see that the patient's name, invoice number, and the billing date (today's date) have already been entered. Only the date field may be modified. The Date Printed field is filled in each time you print the invoice. The Status field returns values of "Paid In Full" or "Balance Due" depending on the invoice. Tab through the fields to enter data.

The first section of the HCFA Entry screen is only important if you have activated and are using electronic billing (see instructions later in this chapter). The first field, "Send or



resend this invoice in next batch?", will be set to "No" by default unless you have turned on AcuBase's electronic billing (E-billing) feature (in the Preferences section of the Main Menu, under the "More… / E-billing" tabs). When electronic billing is set to "On" from Preferences, this field will automatically be set to "Yes" each time a new invoice is created. A "Yes" here indicates that this invoice should be included in the next batch of invoices that are sent in to the billing clearinghouse for electronic processing. Once a batch has been sent in that includes this invoice, the field will automatically be sent back to "No" so that it is not resent in future batches. The date that the invoice was last sent in as part of an E-billing batch will be indicated in the "Date invoice last sent as E-bill" field.

If you have modified an invoice after it was sent, and/or desire to resend an invoice as part of a future E-billing batch for any reason, you may click on "Yes" in the "Send or resend this invoice in next batch?" field.

Again, if you are not using the E-billing features of AcuBase™, you do not need to do anything in the "Electronic Billing" section of the HCFA Entry screen.

The next section of the HCFA Entry screen is the Diagnoses section. Up to four diagnoses should already be entered here from the diagnoses you had previously entered in the Diagnoses section of the Patient Information screen. Whether or not data is entered here, you may click on the Description field next to each number (1 to 4) to see a pop-up list of diagnoses in the database. Each diagnosis field pops up with a list of the close to 2,000 diagnoses provided from the Billing Codes tab of the Main Menu's Preferences button. The list is alphabetical by condition. When you select a condition, the corresponding ICD-9 code is automatically entered. You may skip through this list when it pops up by typing the first few characters of a given diagnosis. You may also hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other diagnosis which may not already be on the list. To add new diagnoses to the pop-up list, do so from the Billing Codes tab of the Main Menu's Preferences button.

Next is the Procedures / Treatment Modalities Used section. You may fill out up to six procedures (acupuncture, cupping, etc.). This part of the entry screen is designed to emulate the look and feel of Lines 24 a-k on the HCFA itself. Fill out the dates of service, Place and Type codes. When you click on the "Procedures" field, you will see a pop-up list of procedures from the Preferences in the AcuBase™ Main Menu. Choose the procedure you would like to bill for, and the appropriate CPT code will automatically be placed into the CPT field. If the procedure you are looking for does not appear on the list, double-click on the Procedure field to enter your own and give it the appropriate code and price, and/or enter in the Main Menu Preferences in the future. Per HCFA regulations, you may bill for up to 6 procedures on one form.

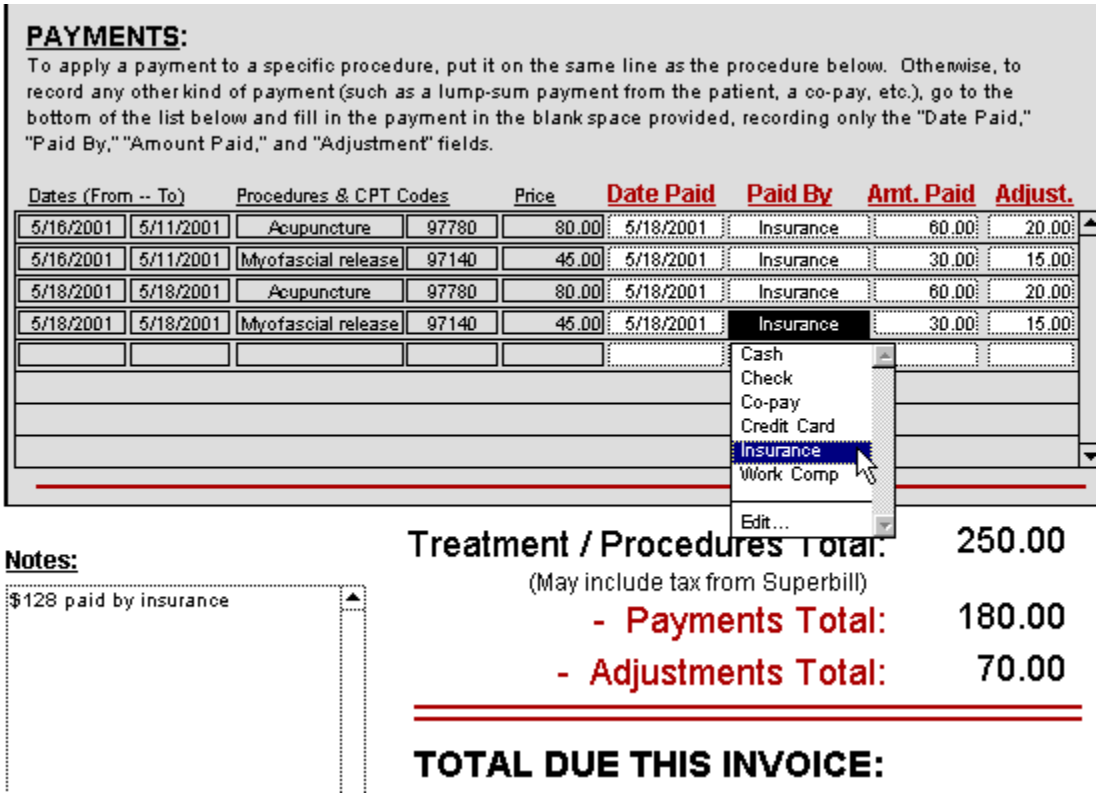
If you tend to use the same procedure on virtually every invoice, you may set AcuBase™ up to auto-enter it into each new invoice (superbill or HCFA). This can be done from the More… tab of the Main Menu's Preferences button, under the "HCFA 1500, Box 24"

field. Fill out as many of the Procedures fields in this field as you like, and those preferences will be auto-entered each time you put in a new procedure date.

The Outside Lab field refers to line 20 of the HCFA 1500 form. If you do plan to charge for outside lab costs on this invoice, click on the "Yes" radio button here, and enter up to two charges.

(Note that your "amounts" for each item must be consistent with the measurements used in the Inventory database. For example, if you buy an herb by the pound, and then sell some of that herb to a patient, it is assumed that you are selling it by the pound! This is the only way that AcuBase™ can accurately keep track of how much of a given item you have sold since last stocking it in inventory.)

The Payments section on this screen is identical to that of the Superbill Entry screen. It allows you to keep track of anywhere from one to several payments made to the invoice. To apply a payment to a specific procedure, put it on the same line as the procedure. Otherwise, to record any other kind of payment (such as a lump-sum payment from the patient, a co-pay, etc.), go to the bottom of the list and fill in the payment in the blank


PAYMENTS:
To apply a payment to a specific procedure, put it on the same line as the procedure below. Otherwise, to record any other kind of payment (such as a lump-sum payment from the patient, a co-pay, etc.), go to the bottom of the list below and fill in the payment in the blank space provided, recording only the "Date Paid," "Paid By," "Amount Paid," and "Adjustment" fields.
Dates (From -- To)
Procedures & CPT Codes
Price
Date Paid
Paid By
Amt. Paid
Adjust.
5/16/2001 5/11/2001 Acupuncture 97780 80.00 5/18/2001 Insurance 60.00 20.00
5/16/2001 5/11/2001 Myofascial release 97140 45.00 5/18/2001 Insurance 30.00 15.00
5/18/2001 5/18/2001 Acupuncture 97780 80.00 5/18/2001 Insurance 60.00 20.00
5/18/2001 5/18/2001 Myofascial release 97140 45.00 5/18/2001 Insurance 30.00 15.00
Cash
Check
Co-pay
Credit Card
Insurance
Work Comp
Edit...
Notes:
$128 paid by insurance
Treatment / Procedures Total: 250.00
(May include tax from Superbill)
- Payments Total: 180.00
- Adjustments Total: 70.00
TOTAL DUE THIS INVOICE:

space provided below the last procedure, recording only the "Date Paid," "Paid By," "Amount Paid," and "Adjustment" fields. The "Paid By" field is a modifiable pop-up list intended to record the method or source of payment. You may select something from the list, or hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter whatever you like. To add new items to the pop-up list, scroll to the bottom of the list and select "Edit…" If the amount paid is lower than the actual amount of the procedure, use the "Adjustment" field if you wish to write off the difference. For instance, if you charged an insurance company $45 for myofascial release, but they only paid $35, you may wish to simply write off the $10 difference, in which case you would enter "10" in the "Adjustment" field. You may also have AcuBase™ do the adjustment calculation for you. After you have entered the amount paid for a given procedure, if it is less than the price charged, you can tab or click into the "Adjustment" field and click on the word "Adjustment;" go to the Commands menu and click on "Auto-Calc Adjustment for this Line-Item"; or simply use the keyboard shortcut: Cntrl+0 in Windows, or Command+0 on a Macintosh.

The final field on this screen is the Notes field. Enter any notes that would like to have attached to this invoice. This field does not show up on the printed invoice.

If you have other field on the HCFA form that have not been entered properly, you may click on the "View Other HCFA Details for This Patient" button on the bottom of the screen.

When you are ready to print the invoice, click on the "Print HCFA" button at the top of the screen. This will take you to a preview of the invoice before it prints. Whether the HCFA prints out completely, or only the fields print (because it is designed to be printed ONTO a pre-existing HCFA 1500 form that has been loaded into your printer) depends on the way you have set up your print job (see the "Align HCFA" button below).

The buttons at the top of the HCFA Entry screen offer many options. The two help buttons allow you to either go to a help screen to see all of the features of the HCFA Entry screen (the "Screen Help" button); or go to the HCFA Help screen ("HCFA Help" button), which shows a HCFA form with all of its fields. If you do not know where to go in AcuBase™ to fill in a given field on the HCFA form, simply click on the HCFA Help button, and then click on the part of the HCFA form you have a question about. AcuBase™ will take you to the appropriate part of the program to fill out the part of the form in question.

Other buttons at the top of the HCFA Entry screen allow you to switch to the Superbill Entry screen for this invoice; view all invoices for this patient; print this invoice onto a HCFA form; print this invoice onto a Superbill; print an envelope to the insurance company related to this invoice; delete the invoice; return to the Patient Information & Billing database; or return to the AcuBase™ Main Menu.

Two notes related to the way the total cost of procedures are calculated:

1. If you created a HCFA for a given patient visit, and also wish to bill for products (which may not be placed on the HCFA form as a procedure), click on the "Superbill Entry" button at the top of the screen. You may then enter products onto the same invoice from the Products Bought section of the superbill entry screen. The Total Charge on the HCFA 1500 form (line 28) will not include any charges related to products sold.

2. If you switch from the HCFA Form view of this invoice to the Superbill Entry view (by clicking on the "Superbill Entry" button at the top of the screen), outside lab costs, if any, may be calculated into the total cost of procedures on the superbill.

Entering Other HCFA-Specific Data

There are many fields which must be filled on the average HCFA form. Aside from the obvious (name, address, diagnoses, procedures), there are also many less obvious (Plan Type, Patient's Relationship to Insured, etc.). In order to fill out the less obvious fields, which we call "HCFA Details" for a given patient, you must click on the "HCFA Details" button. This button may be found on the bottom of any HCFA Entry screen, and clicking on it will take you to the Patient Information tab in the Patient Information database—the same place you start when you add a new patient to AcuBase™. These fields, most of which are designated by a HCFA line number, only need to be filled out once per patient, and may be changed at any time.

To enter HCFA details for a given patient,

1. For each patient, click on the "HCFA Details" button on the bottom of the HCFA Entry screen, or simply go to the "Patient Information" tab of the Patient Information database.

2. Simply scroll down to the HCFA Preferences section and tab through each field, filling them out appropriate to the patient. Note that most fields will also refer to a given line or lines on the HCFA itself. Note that you only need to fill these fields ONCE for each patient in the database, and only for those for whom you will be printing HCFA forms. If you will only be printing Superbills for a given patient, you will not need to fill out the fields on this part of the Patient Information screen.

Creating HCFAs from Superbills and Vice-Versa

If you wish to create a HCFA from a previous Superbill (or vice-versa), it's easy.

1. Return to the transaction for which you would like to print a HCFA or Superbill (see "Editing or Viewing a Past Transaction," below). This takes you to the Superbill Entry screen for this transaction.

- If you wish to print a HCFA from a superbill, simply click on the "HCFA Entry" button at the top of the Superbill Entry screen for a given invoice and then fill out the appropriate fields. Be sure that all HCFA details are filled out for this patient, as well (see "Entering Other HCFA-Specific Data," above). Click on the "Print HCFA" button at the top of the screen when you are ready.

- If you wish to create a Superbill from an existing HCFA, click on the "Superbill Entry" button at the top of the HCFA Entry screen for a given invoice, and then fill out any other appropriate fields on the superbill, clicking on the "Print Superbill" button when ready.

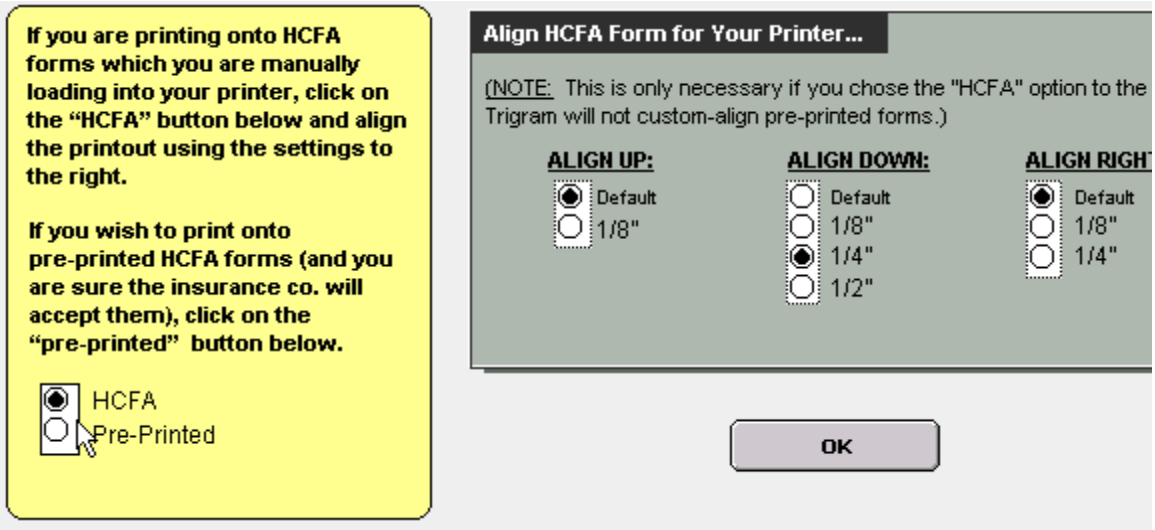
2. Return to the Patient Information database by clicking on the "Return to Patient Info" button.

Aligning the HCFA Form for Your Printer

AcuBase™ gives you two options for HCFA printing. The first is to print a pre-printed HCFA directly onto the printer from the computer. (Note that most insurance companies will NOT accept HCFA forms printed directly from the computer, as they prefer the standard, double-sided, pink HCFA 1500 forms. For this reason, we do not support this feature of the program.) The second, and most accepted by insurance companies, is to print the data from the computer onto a blank HCFA form which you place in your printer. These forms may be ordered from most medical supply houses. We recommend contacting The Supply Center at 818-710-6868 or 800-549-5993.

Because every printer is different in the way that it aligns forms, we have provided several options to get your forms printing into the correct fields properly. To align the forms properly, print a HCFA form from the computer, and measure how far off the print job may be (whether or not the fields print within the appropriate boxes). If they do not…

1. Click on the Align HCFA button on the bottom-left side of the Billing screen of the Patient Information database, or from the top of any HCFA Entry screen. This will open the HCFA format and alignment screen.


If you are printing onto HCFA forms which you are manually loading into your printer, click on the "HCFA" button below and align the printout using the settings to the right.
If you wish to print onto pre-printed HCFA forms (and you are sure the insurance co. will accept them), click on the "pre-printed" button below.
HCFA
Pre-Printed
Align HCFA Form for Your Printer...
(NOTE: This is only necessary if you chose the "HCFA" option to the Trigram will not custom-align pre-printed forms.)
ALIGN UP:
Default
1/8"
ALIGN DOWN:
Default
1/8"
1/4"
1/2"
ALIGN RIGH
Default
1/8"
1/4"
OK

2. On the left side of the screen, choose whether you wish to print onto a blank HCFA form in your printer (HCFA), or do a pre-printed one (Pre-Printed). If you choose to print onto a blank form, you may choose the alignment options to the right at any time, as necessary, to adjust for your particular printer. (If, upon adjusting these settings, you are still unable to print into the fields of the HCFA properly, contact Trigram Software to arrange for a custom printer alignment.)

3. Once you have chosen your HCFA printing method, and have aligned the forms for your printer, you only need to visit this screen if you get a new printer. The settings made on this screen are static until you change them.

Editing or Viewing a Past Transaction

After creating an invoice (HCFA or superbill), you may wish to return to that transaction to make edits, to delete it, or to apply payments. To do so,

1. Go to the Billing tab within the Patient Information database. This will take you to the Billing Information screen.

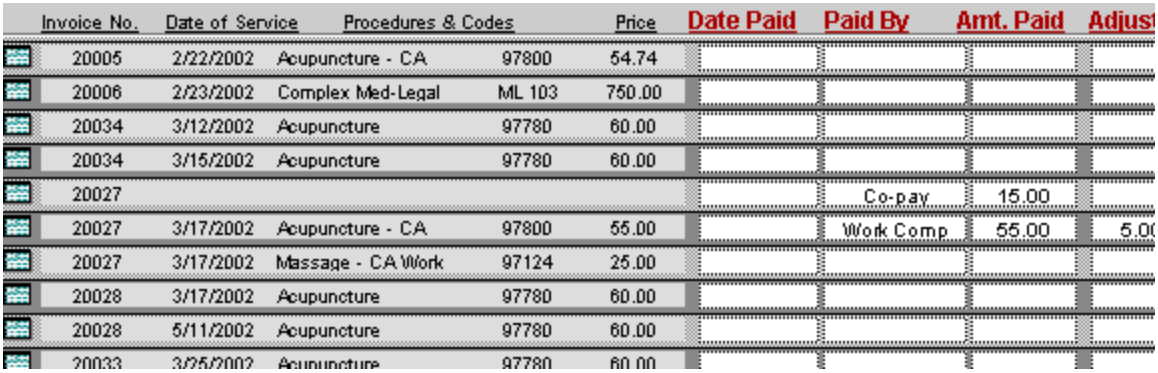
2. Choose the transaction you wish to view by clicking on the button to the left of the transaction date in the list of transactions. This will bring up the transaction in a HCFA or Superbill window (depending upon the preferences you set under the More… tab in the Main Menu's Preferences section). You may make edits from here.

3. Click on the "Return to Patient Info" button to close this window, or print the HCFA or Superbill out by going to the appropriate button at the top of the screen.

Payment Entry Screen

From the Payment Entry screen, you may apply line-item payments to any invoice without having to go directly to each invoice's "Payment Entry" section. You may access the Payment Entry screen from either the View All Invoices mode when you are viewing all of the invoices for a given patient (you will see an "Enter Line-Item Payments" button at the top of the View as List screen); or you may click on the "Payment Entry" button at the bottom of the Billing tab screen in the Patient Information database.

The Payment Entry screen shows a list of all transactions related to a given patient sorted by the date of the transaction. Clicking on the blue box to the left of each transaction takes you to that transaction's invoice.



Invoice No.	Date of Service	Procedures & Codes		Price	Date Paid	Paid By	Amt. Paid	Adjust
20005	2/22/2002	Acupuncture - CA	97800	54.74				
20006	2/23/2002	Complex Med-Legal	ML 103	750.00				
20034	3/12/2002	Acupuncture	97780	60.00				
20034	3/15/2002	Acupuncture	97780	60.00				
20027						Co-pay	15.00	
20027	3/17/2002	Acupuncture - CA	97800	55.00		Work Comp	55.00	5.0
20027	3/17/2002	Massage - CA Work	97124	25.00				
20028	3/17/2002	Acupuncture	97780	60.00				
20028	5/11/2002	Acupuncture	97780	60.00				
20033	3/25/2002	Acupuncture	97780	60.00				

This screen works much the same as the "Payment Entry" section on the HCFA Entry or Superbill Entry screens. To apply a payment to a specific procedure, put it on the same line as the procedure. The "Paid By" field is a modifiable pop-up list intended to record the method or source of payment. You may select something from the list, or hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter whatever you like. To add new items to the pop-up list, scroll to the bottom of the list and select "Edit…" If the amount paid is lower than the actual amount of the procedure, use the "Adjustment" field if you wish to write off the difference. For instance, if you charged an insurance company $45 for myofascial release, but they only paid $35, you may wish to simply write off the $10 difference, in which case you would enter "10" in the "Adjustment" field. You may also have AcuBase™ do the adjustment calculation for you. After you have entered the amount paid for a given procedure, if it is less than the price charged, you can tab or click into the "Adjustment" field and click on the word "Adjustment;" go to the Commands menu and click on "Auto-Calc Adjustment for this Line-Item"; or simply use the keyboard shortcut: Cntrl+0 in Windows, or Command+0 on a Macintosh.

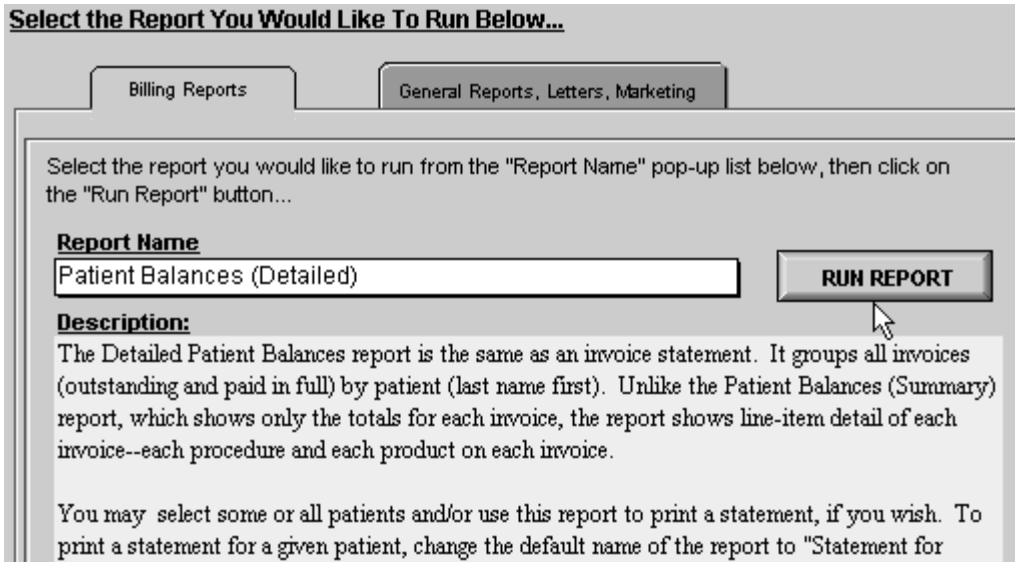
To record any other kind of payment (such as a lump-sum payment from the patient, a co-pay, etc.), go to the bottom of the list and fill in the payment in the blank space provided below the last procedure, recording only the "Date Paid," "Paid By," "Amount Paid," and "Adjustment" fields.

Other buttons at the top of the Payment Entry screen allow you to go to the current invoice (depending upon which line-item have you have the cursor in); print all of the invoices onto Superbills or HCFA forms (useful if you wish to rebill for outstanding balances after some payments have been made); or Find All, which shows all invoices for all patients in alphabetical and date order. You may also choose to return to the Patient Information & Billing database or return to the AcuBase™ Main Menu.

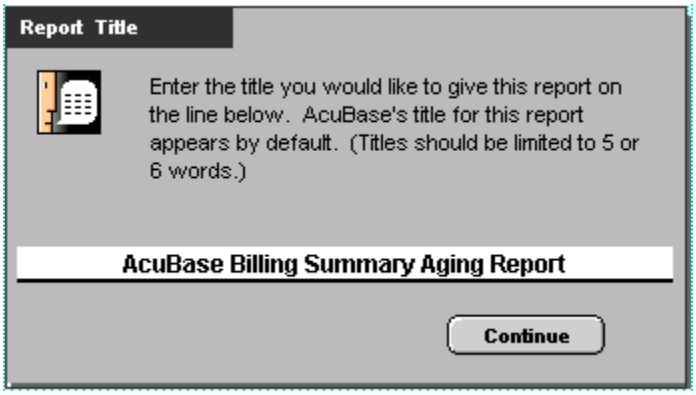
Reports

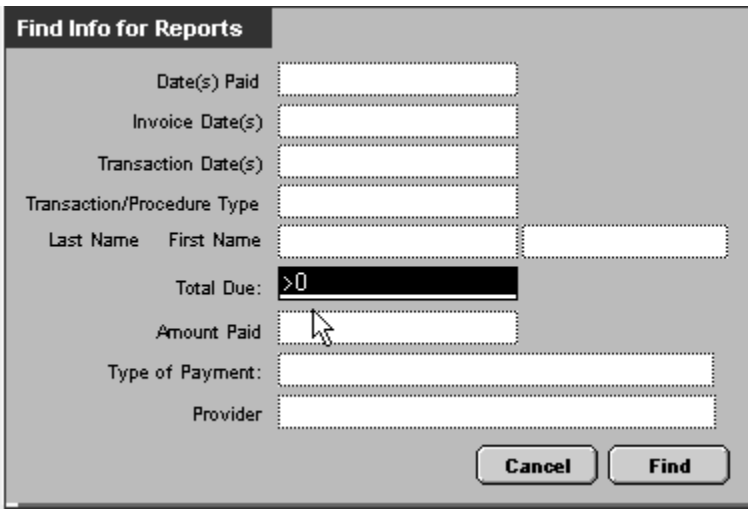
Click on the Reports button from within the Patient Information and Billing database to print out billing reports, or more general reports (a personalized phone book, Avery labels, letters, or envelopes related to the patients in your Patient Information database). You may also go to the Reports button from the Main Menu and select the Billing tab to access these reports.

To create a report, click on the "Report Name" field to see a pop-up list of available billing- and patient information-related reports. When you select a report from the list, the report's description appears below it. When you are ready to run the selected report, click on the "Run Report" button. On all other Report screens throughout AcuBase™, simply click on the button related to the report that you would like to create.


Select the Report You Would Like To Run Below...
Billing Reports
General Reports, Letters, Marketing
Select the report you would like to run from the "Report Name" pop-up list below, then click on the "Run Report" button...
Report Name
Patient Balances (Detailed)
RUN REPORT
Description:
The Detailed Patient Balances report is the same as an invoice statement. It groups all invoices (outstanding and paid in full) by patient (last name first). Unlike the Patient Balances (Summary) report, which shows only the totals for each invoice, the report shows line-item detail of each invoice--each procedure and each product on each invoice.
You may select some or all patients and/or use this report to print a statement, if you wish. To print a statement for a given patient, change the default name of the report to "Statement for

For almost all of the reports you may elect to run in AcuBase™, you will first be taken to the "Report Title" screen, where the name of the report appears and may be modified as you wish. After you have selected the report name and clicked the "Continue" button, you will be taken to a screen where you can refine your search for the records you will be reporting on (the "Find Info for Reports" screen). A number of fields may be used to perform a "Find" here. If you wish to print a report reflecting data related to all of your records, simply click on the "Find" button, or the "Continue" button on the left side of the screen, without entering any data in the fields. If you do wish to find and report on only certain records (say, only a given patient, or only a give billing date range), you can enter that on this Find screen, and then click Find to continue. There are specific characters necessary in order to find a range, greater than, less than, etc. See the "To Find Records" section of the "Getting Started with AcuBase™" chapter in this user's manual for details on how to refine your searches.


Report Title
Enter the title you would like to give this report on the line below. AcuBase's title for this report appears by default. (Titles should be limited to 5 or 6 words.)
AcuBase Billing Summary Aging Report
Continue



Once the Find has been completed, you will see a print preview of your report before it is printed. If you like the way it looks, click "Continue" on the left side of the screen to go to the print dialog window for your printer. If the report does not look right or you would not like to print it, simply click "Continue" on the print preview screen, and then click "Cancel" when your printer's print dialog window.

Important note about printing reports: On some occasions, the print preview of a report may look good, but when you go to print, the printed version only prints one line of data in the report. If this happens, go to print the report again and, when your printer's print dialog window comes up (the first window after the print preview), make sure that "Print: Records Being Browsed" is selected, rather than "Print: Current Record."

Billing Reports

What follows are summaries of each report that can be printed from the Patient Information and Billing database's Reports screen.

Billing Summary By Patient

This report lists each patient alphabetically and shows their totals billed, paid, adjusted, and outstanding.

AcuBase Billing Summary By Patient
Printed 10/16/2000

Patient Name	Invoice Totals	Payments	Adjustments	Total Balance Due
Frank, Sesno	185.00	90.00	55.00	40.00
Jones, Jason A.	899.95	400.00	40.00	459.95
TOTALS FOR ALL PATIENTS:	1,084.95	490.00	95.00	499.95

Create Electronic Billing Batch

If you have activated the electronic billing features of AcuBase, you will be sending a file to the billing clearinghouse which contains all of the current invoices that you would like to have billed. This report creates the latest batch file of invoices which you will then send through the Internet to the billing clearinghouse. The billing clearinghouse then sends each individual invoice to the appropriate insurance company electronically. This file usually contains multiple invoices (a "batch") from several different patient visits, and the frequency with which you send it out may vary depending upon how busy your practice is. In most cases, you will be sending out a batch of invoices that have never been sent before. Once a batch has been sent, the date it was sent may be seen at the top of each invoice.

If you wish to rebill / resend an invoice which has been sent in the past, you may go to that invoice and, at the top of the screen, change the option of "Resend this invoice in next batch" to "Yes."

For more information on electronic billing, please refer to the Electronic Billing chapter in this user's manual.

Detailed Summary of Products Sold

This report summarizes products sold, and sorts the list by the date of the invoice (date sold) and the patient name. The report includes invoice date, invoice number, the patient name, the number (amount) of product sold to the patient, the product that was sold, the way the units are measured (by bottle, bag, etc.), and the price, tax, and total. Sum totals of all products sold for this report are shown at the end of the report.

Detailed Summary of Products Sold (By Date)

Invoice Date	Invoice #	Patient Name	#	Product	Sold by...	Price Each	Tax Each	Ttl This Item
1/24/2001	1156	Barnes, Karnella	1	Ease The Journey - Yin	Bottle(s)	20.00	0.00	20.00
1/24/2001	1156	Barnes, Karnella	1	Ease The Journey--yang	Bottle(s)	25.00	0.00	25.00
2/1/2001	1160	Kemp, LaDale	2	Liver Dtx ™	Bottle(s)	20.00	0.00	40.00
2/2/2001	1161	Jenkins, Dean	2	Back Support (chronic)™	Bottle(s)	20.00	0.00	40.00
2/2/2001	1161	Jenkins, Dean	2	Traumanex	Bottle(s)	20.00	0.00	40.00
2/7/2001	1162	Barnes, Karnella	1	Ease The Journey - Yin	Bottle(s)	20.00	0.00	20.00
2/7/2001	1162	Barnes, Karnella	1	Ease The Journey--yang	Bottle(s)	25.00	0.00	25.00
3/23/2001	1186	Echols, Diana D.	1	Astra 18 Diet™	Bottle(s)	20.00	0.00	20.00
3/23/2001	1186	Echols, Diana D.	1	Astra Diet Tea™	Box(es)	6.00	0.00	6.00
3/23/2001	1187	Jacks, Martin	1	Jin Gui Shen Qi Wan	Bottle(s)	10.00	0.00	10.00
3/23/2001	1187	Jacks, Martin	1	Tremella And American	Bottle(s)	20.00	0.00	20.00

TOTALS-- ALL PRODUCTS SHOWN HERE:	Total # Product Sales	Total Before Taxes	Total Taxes	Total Products + Taxes
	14	266.00	0.00	266.00

General Summary of Products Sold (Sorted by Product)

This report summarizes products sold by product name, and shows the number of each product sold and the total amount collected for the product, the amount of taxes (if any) collected for this product, and the total after taxes. Sum totals for all products sold for this report are shown at the end of the report

Summary of Products Sold--By Product

Product	Sold by...	Number Sold	Total Before Taxes	Total Amt of Taxes	Ttl This Item
Astra 18 Diet™	Bottle(s)	5	100.00	0.00	100.00
Astra Diet Tea™	Box(es)	2	12.00	0.00	12.00
Back Support (acute)™	Bottle(s)	1	20.00	0.00	20.00
Back Support (chronic)™	Bottle(s)	3	60.00	0.00	60.00
Ease The Journey - Yin	Bottle(s)	6	105.00	0.41	105.41
Ease The Journey--yang	Bottle(s)	2	50.00	0.00	50.00
Eight Treasures™	Bottle(s)	1	20.00	0.00	20.00
Liver Dtx ™ (detoxification)	Bottle(s)	2	40.00	0.00	40.00
TOTALS-- ALL PRODUCTS SHOWN HERE:		Total Products Sold: 22	Total Before Tax: 407.00	Total Taxes: 0.41	Total Products + Tax: 407.41

Patient Balances (Detailed)

The Detailed Patient Balances report is the same as an invoice statement. It groups all invoices (outstanding and paid in full) by patient (last name first). Unlike the Patient Balances (Summary) report, which shows only the totals for each invoice, the report shows line-item detail of each invoice—each procedure and each product on each invoice. Note that no more than 8 products and 6 procedures plus three extra payments per invoice will be shown.

You may select some or all patients and/or use this report to print a statement, if you wish. To print a statement for a given patient, change the default name of the report to "Statement for (Patient Name)" or to whatever else you want to call it, and then do a find for that patient alone when the "Find Info for Reports" window comes up.

By default, the message "The Total Outstanding amount is payable immediately. Please remit to the address above." shows up at the bottom of each statement. This message may be modified from the More… tab of the Main Menu's Preferences button.

Patient Balances (Summary)

The Patient Balances (Summary) report is the same as an invoice statement. It groups all invoices (outstanding and paid in full) by patient (last name first). For each patient, the report shows the patient name, and the totals for each invoice. The Patient Balances

(Detailed), by contrast, shows line-item detail of each invoice—each procedure and each product on each invoice.

BILLING STATEMENT FROM: Jason Luban, L.Ac.
Montclair Acupuncture Associates
235 Mountain Blvd., #226
Oakland CA 94611
(510) 654-3268

atient Name: **Jason A. Jones**
16 Taurus Avenue
Oakland CA 95442

Invoice Date	Procedure(s)	Product(s)	Invoice Totals	Payments	Adjustments	Total outstanding
2/1/2000	55.00	10.00	65.00	55.00	10.00	
3/1/2000	55.00	0.00	55.00	55.00		
3/12/2000	55.00	0.00	55.00	45.00	10.00	
9/17/2000	380.00	84.95	464.95	120.00	10.00	334.95
9/18/2000	0.00	90.00	90.00			90.00
10/10/2000	55.00	20.00	75.00	50.00		25.00
10/16/2000	75.00	20.00	95.00	75.00	10.00	10.00
TOTALS:	675.00	224.95	899.95	400.00	40.00	**459.95**

The above total, **$459.95**, is payable immediately. Please remit to the address above.

You may select some or all patients and/or use this report to print a statement, if you wish. To print a statement for a given patient, change the default name of the report to "Statement for (Patient Name)" or to whatever else you want to call it, and then do a find for that patient alone when the "Find Info for Reports" window comes up.

By default, the message "The Total Outstanding amount is payable immediately. Please remit to the address above." shows up at the bottom of each statement. This message may be modified from the More… tab of the Main Menu's Preferences button.

Payment Summary (By Date Paid)

This report summarizes payments by the date each payment transaction was made. It also includes amount paid, how it was paid (cash, check, etc.), and which procedures (if any) each payment was applied to. Grand totals are at end of the report.

To find by a given date range or for a given payment type, enter a date range under the "Date(s) Paid" field, and/or use the "Type of Payment" field when the "Find Info for Reports" window comes up before the print preview.

Payment Summary -- By Date Paid

Date Paid	Amt. Paid	Inv. #	Paid By	Adjustment	Applied to (CPT Codes, Procedures, Date of Service, and Pr			
01/03/2001	205.00	1155			97780	Acupuncture	12/16/2000	60.00
01/22/2001	15.00	1158			97780	Acupuncture	01/22/2001	15.00
01/24/2001	235.00	1156			97780	Acupuncture	01/08/2001	60.00
02/01/2001	180.00	1160			97780	Acupuncture	02/01/2001	60.00
02/02/2001	260.00	1161			97780	Acupuncture	02/01/2001	60.00
02/07/2001	400.00	1162		10.00	97780	Acupuncture	02/07/2001	60.00
02/16/2001	120.00	1170			97780	Acupuncture	02/16/2001	60.00
02/17/2001	60.00	1169		108.00	97780	Acupuncture	02/17/2001	60.00
02/20/2001	210.00	1157			97780	Acupuncture	01/23/2001	75.00
02/24/2001	206.68	1174		48.32	99203	Initial Evaluation,	02/15/2001	50.00
02/27/2001	170.00	1172			97780	Acupuncture	02/13/2001	60.00

Payment Summary (By Patient Name)

This report summarizes payments, sorting in order of patient name, then date. It also includes amount paid, how it was paid (cash, check, etc.), and which procedures (if any) each payment was applied to. Each patient's transactions are summarized before the next patient's record begins. Grand totals show at the end of the report.

Payment Summary -- By Patient

Date Paid	Amt. Paid	Inv. #	Paid By	Adjustment	Applied to (CPT Codes, Procedures, Date of Service, and			
ABRAHAM, JANET E.								
04/30/2001	64.00	1202		61.00	97780	Acupuncture	04/30/2001	60.00
04/30/2001		1202			97140	Myofascial release	04/30/2001	45.00
05/07/2001	64.00	1208		61.00	97780	Acupuncture	05/07/2001	80.00
05/07/2001		1208			97140	Myofascial release	05/07/2001	45.00
05/09/2001	64.00	1213		61.00	97780	Acupuncture	05/09/2001	80.00
05/09/2001		1213			97140	Myofascial release	05/09/2001	45.00
05/11/2001	64.00	1215		61.00	97780	Acupuncture	05/11/2001	80.00
05/11/2001		1215			97140	Myofascial release	05/11/2001	45.00
05/18/2001	30.00	1218	Insurance	15.00	97140	Myofascial release	05/18/2001	45.00

TOTAL--	Total Transactions	Applied Prices	Adjustments	Payments	Total Due
Abraham, Janet E.:	8	730.00	314.00	436.00	-20.00

To find only a given patient, enter the patient's name, use the patient name fields when the "Find Info for Reports" window comes up before the print preview. To find by a given date range or for a given payment type, enter a date range under the "Date(s) Paid" field, and/or use the "Type of Payment" field.

Payment Summary (By Type of Payment)

This report summarizes payments, sorting by type of payment (cash, check, insurance, etc.), then by date. It also includes amount paid, how it was paid (cash, check, etc.), and which procedures (if any) each payment was applied to.

Payment Summary -- By Type

Date Paid	Amt. Paid	Inv. #	Paid By	Adjustment	Applied to (CPT Codes, Procedures, Date of Service, and Pri			
05/18/2001	60.00	1218	Insurance	20.00	97780	Acupuncture	05/16/2001	80.00
05/18/2001	30.00	1218	Insurance	15.00	97140	Myofascial release	05/16/2001	45.00
05/18/2001	60.00	1218	Insurance	20.00	97780	Acupuncture	05/18/2001	80.00
05/18/2001	30.00	1218	Insurance	15.00	97140	Myofascial release	05/18/2001	45.00

TOTAL--	Total Transactions	Applied Prices	Adjustments	Payments	Total Due
Insurance:	4	250.00	70.00	180.00	0.00

TOTAL--	Total Transactions	Applied Prices	Adjustments	Payments	Total Due
AIL PAYMENTS SHOWN:	4	250.00	70.00	180.00	0.00

To find by a given date range or for a given payment type, enter a date range under the "Date(s) Paid" field, and/or use the "Type of Payment" field when the "Find Info for Reports" window comes up before the print preview.

Print Outstanding Invoices

This report will batch print all outstanding invoices onto either Superbills or HCFA 1500 forms, or create a new batch file for those doing electronic billing.

The first screen will ask you whether you would like to print onto Superbills, HCFA forms, or electronically. Make your selection and click "Continue."

The next screen asks you to find any specific records you would like. If you wish to print only statements for specific individuals, you may type one at a time in here by name. If you wish to print out all patients with outstanding balances, type ">0" in the "Total Due" field. Click the "Find" button when ready.

When you get the "Print" screen, be sure that it does not say "Current Record" at the top, but rather "Records being browsed," and that Print Range is set to "All."

Procedure Summary (By Date)

This report lists each procedure billed (in date order), including invoice number, code (CPT), procedure description, price, tax, and total, with sum totals of all procedures at the end of the report. If you wish to find for only one procedure, when the Find Info for Reports window comes up (before the print preview), in the "Transaction/Procedure Type" field, select the procedure you would like to find.

You may wish to only find procedures done within a given date range. To do this, when the Find Info for Reports window comes up (before the print preview), in the "Transaction Date(s)" field, enter your date range and click the "Find" button. (A date range is entered as two dates with "…" between them. For example, to find all transaction for the year 2001 only, you would enter "01/01/2001…12/31/2001" [without the quotes] and click the "Find" button.)

Procedure Summary -- By Date

Date	Inv. #	Code	Procedure Description	Price	Tax %	Total Price
12/16/2000	1155	97780	Acupuncture	60.00		60.00
12/19/2000	1155	97780	Acupuncture	60.00		60.00
12/19/2000	1155		Herbal Medicine	25.00		25.00
01/03/2001	1155	97780	Acupuncture	60.00		60.00
01/08/2001	1156	97780	Acupuncture	60.00		60.00
01/08/2001	1156		Herbal Medicine	5.00		5.00

Procedure Summary (By Patient)

This report summarizes procedures billed in order of patient names, then by date, with subtotals for each patient, and a grand total at the end of the report. If you wish to find

KEMP, LADALE

02/01/2001	1160	97780	Acupuncture	60.00		60.00
02/07/2001	1160	97780	Acupuncture	20.00		20.00
02/12/2001	1160	97780	Acupuncture	20.00		20.00
02/14/2001	1160	97780	Acupuncture	20.00		20.00
02/16/2001	1160	97780	Acupuncture	20.00		20.00

	Total Transactions	Total Prices	Total Taxes	Total w/Tax
TOTAL-- KEMP, LADALE:	5	140.00	0.00	140.00

for only one procedure, when the Find Info for Reports window comes up (before the print preview), in the "Transaction/Procedure Type" field, select the procedure you would like to find.

You may also wish to only find procedures done within a given date range. To do this, follow the directions given under the Procedure Summary (By Date).

Procedure Summary (By Type)

This report lists and summarizes (totals) each procedure, with the same fields as the Procedure Summary (By Date) report. But this report is sorted by type of procedure (acupuncture, electroacupuncture, etc.), with subtotals for each, and a grand summary total at the end of the report. If you wish to find for only one procedure, when the Find Info for Reports window comes up (before the print preview), in the "Transaction/ Procedure Type" field, select the procedure you would like to find.

You may also wish to only find procedures done within a given date range. To do this, follow the directions given under the Procedure Summary (By Date).

02/24/2001	1187	97780	Acupuncture-copay	15.00		15.00
03/02/2001	1184	97780	Acupuncture-copay	15.00		15.00
03/08/2001	1187	97780	Acupuncture-copay	15.00		15.00
03/09/2001	1184	97780	Acupuncture-copay	15.00		15.00
03/14/2001	1187	97780	Acupuncture-copay	15.00		15.00
03/16/2001	1184	97780	Acupuncture-copay	15.00		15.00
03/21/2001	1187	97780	Acupuncture-copay	15.00		15.00
03/23/2001	1184	97780	Acupuncture-copay	15.00		15.00
04/06/2001	1191	97780	Acupuncture-copay	15.00		15.00
TOTAL--			Total Transactions	Total Prices	Total Taxes	Total w/Tax
ACUPUNCTURE-COPAY:			12	180.00	0.00	180.00
07/14/2001	1222	97802	Cupping	20.00		20.00
TOTAL--			Total Transactions	Total Prices	Total Taxes	Total w/Tax
CUPPING:			1	20.00	0.00	20.00

Summary Aging (By Patient)

The Summary Aging (By Patient) Report sorts outstanding balances alphabetically by patient, summarizing the total amount each patient with an outstanding balance owes. These total balances are grouped into columns representing outstanding balances of 120+ days, 90-120 days, 60-90 days, 30-60 days, and 0-30 days from the date the report is run.

Summary Aging (By Patient)

Patient Name	30 Days or Less	30-60 Days	60-90 Days	120 Days or More
Anderson, Christopher	0.00	95.00	0.00	0.00
Bowers, Kristen	95.00	380.00	0.00	0.00
Broude, Marla	285.00	760.00	0.00	110.00
Brown, Daphyne	0.00	0.00	0.00	0.00
Castle, Kate	0.00	0.00	0.00	210.00
Doe, Jane	181.65	0.00	165.00	1,277.33
Downard, Hydi	600.00	1,615.00	0.00	40.00
Flood, Victoria	0.00	0.00	0.00	0.00
Frazier, Willetta	0.00	0.00	0.00	80.00
Fuller, Lisa	95.00	95.00	0.00	0.00
Hanson, Stuart	0.00	0.00	0.00	210.00
Hersch, Mindy	0.00	0.00	0.00	60.00
Jacks, Martin	0.00	0.00	0.00	30.00
Judge, Paula	0.00	95.00	0.00	0.00

Important! When the option to print comes up, be sure that the selection at the top of the print screen is "Records Being Browsed," and that you have selected "All" pages. Otherwise, you will only get one line of text.

Summary Aging (By Period)

The Summary Aging (By Period) report shows all outstanding invoices, and groups them by aging categories of 120+ days, 90-120 days, 60-90 days, 30-60 days, and 0-30 days from the date the report is run. Within each date category, records are sorted by invoice date and patient name.

AcuBase Billing Summary Aging Report

Invoice Date	Patient Name	Invoice Total	Amount Paid	Adjustment	Total Due
120+ Days					
9/1/97	Chen, John	192.60	100.00	20.00	72.60
TOTALS FOR 120+ DAYS:		192.60	100.00	20.00	72.60
90 - 120 Days					
6/27/99	Chen, John	55.00			55.00

Important! When the option to print comes up, be sure that the selection at the top of the print screen is "Records Being Browsed," and that you have selected "All" pages. Otherwise, you will only get one line of text.

Summary by Date Invoice Printed

This report summarizes each invoice, sorting it by the date it was last printed. The report includes invoice number, invoice date, provider, patient name, invoices totals, adjustments, payments, and balance due (if any), as well as a grand total at the end of the report. It is highly recommended that you enter a date range in the "Last Date(s) Printed" field when the "Find Info for Reports" windows comes up. Otherwise, your report will start with all of the invoices that have yet to be printed (because there is no "Date Printed" associated with the invoice).

Invoice Summary -- By Date Printed

Date Printed	Invoice #	Invoice Date	Provider	Patient Name	Invoice Ttl	Adjust.	Payments	Bal. Due
4/30/2001	1202	4/30/2001	Jason A. Luban,	Abraham, Janet E.	125.00	61.00	64.00	0.00
5/7/2001	1208	5/7/2001	Jason A. Luban,	Abraham, Janet E.	125.00	61.00	64.00	0.00
5/9/2001	1213	5/9/2001	Jason A. Luban,	Abraham, Janet E.	125.00	61.00	64.00	0.00
5/11/2001	1215	5/11/2001	Jason A. Luban,	Abraham, Janet E.	125.00	61.00	64.00	0.00
5/18/2001	1218	5/18/2001	Jason A. Luban,	Abraham, Janet E.	290.00	70.00	180.00	40.00

TOTALS--	Invoice Totals	Adjustments	Payments	Total Due
ALL INVOICES SHOWN HERE:	790.00	314.00	436.00	40.00

Summary Daily Report

This report shows a summary of invoices for a given billing date, including procedures, products, payments, adjustments, and total amounts outstanding. This report shows subtotals for each provider (AcuBase™ allows a maximum of three providers using the database), and also has a grand total for all three providers at the end of the report.

To run this report properly for a given date, you should find for the date you wish to report on by entering it in the "Invoice Date(s)" field in the Find Info for Reports window (which comes up before the print preview). Failure to do this will give you a very inaccurate "daily" report which summarizes multiple dates!

Summary Daily Report for 05/07/2001

Provider: **Jason A. Luban, L.Ac.**

Invoice #	Procedure(s)	Product(s)	Invoice Totals	Payments	Adjustments	Total outstanding
1208	125.00	0.00	125.00	64.00	61.00	0.00
1209	120.00	0.00	120.00	60.00	60.00	0.00
1210	60.00	0.00	60.00	45.00		15.00
1212	60.00	20.00	80.00	55.00		25.00
TOTALS:	365.00	20.00	385.00	224.00	121.00	**40.00**

TOTALS-- ALL PATIENTS:	Procedure(s)	Product(s)	Invoice Totals	Payments	Adjustments	Total Due
	365.00	20.00	385.00	224.00	121.00	40.00

Summary of Ebilling Batches (By Date Batch Created)

This report shows a summary of each batch of electronic billing which has been created. Use this report to see which invoices have been batched together to be sent electronically, and when those batches were created. The report is sorted by the date the batch of invoices was created, and then by the name of the patient, and the invoice number. It also includes the total amount of the invoice, the amount paid, adjusted, and total outstanding.

Transaction Report

This big chunky report shows a detailed accounting of each invoice, including procedures and products sold, as well as payments and adjustments, as it relates to each provider. Note that no more than 8 products and 6 procedures plus three extra payments per invoice will be shown. Subtotals by provider, and grand totals for all are at the end of the report.

Transaction Report

Patient Name / Invoice # / Dates		Procedure(s) \ Payments \ Product(s)	Price (+tax)	Payments, Paid By	Adjustments
Transaction Summary for Jason A. Luban, L.Ac.					
Barnes, Karnella					
1155					
12/16/2000	97780	Acupuncture	60.00	205.00	
12/19/2000	97780	Acupuncture	60.00		
12/19/2000		Herbal Medicine	25.00		
1/3/2001	97780	Acupuncture	60.00		
Barnes, Karnella					
1156					
1/8/2001	97780	Acupuncture	60.00	235.00	
1/8/2001		Herbal Medicine	5.00		
1/17/2001	97780	Acupuncture	60.00		
1/24/2001	97780	Acupuncture	60.00		
	1 Bottle(s)	Ease The Journey - Yin	20.00		
	1 Bottle(s)	Ease The Journey--yang	25.00		

Transaction Summary By Month

The Transaction Summary By Month report groups all invoices (outstanding and paid in full) by the months of the year. The report is sorted by month and year. Within each month, the date of each invoice is given, followed by the patient related to the invoice, and invoice totals. Totals for each month follow, and totals for all months show at the bottom of the report.

Some users have reported issues with months and their years printing in incorrect order. We have found this to be an issue with users who have data in the database that dates back to, or before, the year 2000. If this happens to you, simply run this report for one year at a time rather than for multiple years. To do this, when the Find Info for Reports window comes up (before the print preview), in the “Invoice Date(s)” field, enter your date range and click the “Find” button. (A date range is entered as two dates with “…” between them. For example, to find all transaction for the year 2001 only, you would enter “01/01/2001…12/31/2001” [without the quotes] and click the “Find” button.)

Important! When the option to print comes up, be sure that the selection at the top of the print screen is "Records Being Browsed," and that you have selected "All" pages. Otherwise, you will only get one line of text.

AcuBase Billing Summary By Month
as of 10/16/2000

Month and Year

Invoice Date	Patient Name	Invoice Total	Amount Paid	Adjustment	Total Due
February, 2000					
2/1/2000	Jones, Jason A.	65.00	55.00	10.00	0.00
Total For February, 2000:		65.00	55.00	10.00	0.00
March, 2000					
3/1/2000	Jones, Jason A.	55.00	55.00		0.00
3/12/2000	Jones, Jason A.	55.00	45.00	10.00	0.00
Total For March, 2000:		110.00	100.00	10.00	0.00

General Reports, Letters, Marketing

The General Reports consist of a patient information report, a personalized patient phone book, Avery labels, a birthday letter, a new patient letter, and envelopes related to the patients in your Patient Information database. To create any one of these reports, you must first find and sort the records that you want in your report. Once you have found and sorted the records you would like to include, you will be able to preview and/or print that report.

Patient Information Report

This report summarizes each patient's general information, including name, address, insurance information, diagnoses, etc. It does NOT print out SOAP notes for each patient. This may be done from each individual patient's Activities tab. To find a given patient, enter the patient name in the "Find Info for Reports" screen that comes up before the print preview.

Patients Phone Book

This report prints a two-column phone book of all patients, their address, and phone/ contact information.

Avery 5160 and 5162 Labels

This report prints patient names and addresses onto standard Avery brand 5160 and 5162 labels.

#10 Envelopes

This button prints one or several patient names and addresses onto #10-sized envelopes. Note that each printer is different, so the way that you are required to load envelopes into your printer may vary. To find a given patient, enter the patient name in the "Find Info for Reports" screen that comes up before the print preview.

New Patient Letters

The New Patient Letter prints a one-page new patient welcome letter. This letter's contents may be customized from the Main Menu's Preferences button, under the More…, Letters tab. To find a given patient, enter the patient name in the "Find Info for Reports" screen that comes up before the print preview.

When you run a this report for a given patient, AcuBase™ remembers that the letter has been printed for that patient, and shows a message to that effect on the Patient Information screen for each patient who has had a letter printed (just under the "Referred By" field).

Referral Thank You Letters

The Referral Thank You Letter prints a one-page letter to thank your referral source for the referral of a given patient. This letter's contents may be customized from the Main Menu's Preferences button, under the More…, Letters tab. To find a given patient, enter the patient name in the "Find Info for Reports" screen that comes up before the print preview.

When you run a this report for a given patient, AcuBase™ remembers that the letter has been printed for that patient, and shows a message to that effect on the Patient Information screen for each patient who has had a letter printed (just under the "Referred By" field).

Birthday Letter

The Birthday Letter prints a one-page letter to acknowledge a patient's birthday. This letter's contents may be customized from the Main Menu's Preferences button, under the More…, Letters tab. To find all patients with a birthday in a given month, click on the "Month of Birth" field in the "Find Info for Reports" screen that comes up before the print preview. To find a given patient, enter the patient name on this screen.

Custom Letters 1 and 2

The custom letter reports print a one-page letter that you may customize to your liking. The letter title and contents may be customized from the Main Menu's Preferences button, under the More…, Letters tab. Use the "Find Info for Reports" screen that comes up before the print preview to determine who will get the letter.

View as List

The View as List button allows you to view all or some of the patients found in the Patient Information & Billing database. You may also view the provider name, patient phone number, and total balance due from this screen. You may sort this list by patient name, provider, payment type, or total balance due by simply clicking on the sort button found next to each of these fields' names. To get more details on a given patient's record, click on "View As Form" at the top of the screen, or click on the button to the left of each patient's name.

Sorting Records

This is the sort button. While the Patient Information & Billing database defaults to sort by the last name and then first name of each patient, the user may also choose to sort and view the patients by patient phone number or total balance due (see "View As List," above). If you wish to sort by other fields that do not have the sort button next to their respective field name, you may go to the Mode pull-down menu and select "Sort…"

Creating New Records

To add a new patient to the Patient Information & Billing database, simply click on the "New Patient" button from either Form View or View as List mode. You will be presented with a blank patient information screen in Form View.

Finding Records

To perform a "find," click on the "Find Record" button. A screen will appear that shows the fields that you can find by. Simply enter the information (or any part of it) into the appropriate fields, and click on the "Find" button. If only one record was found, that one record will be shown in Form View. If more than one record is found, you will be taken directly to View as List to see a list of the found records. To find all records in the Patient Information & Billing database, click on the "All Records" button from the Find screen.

Like any other find request, the Find feature in the Patient Information & Billing database follows the rules of a find given in Chapter 2, under "Finding Records." Refer to that section for more detailed information on finding records.

Find All

Once you have done a find for a set of records, only those records are available to view from that point forward. To bring all contacts in the Patient Information & Billing database back into the "found set," click on the "Find All" button.

Deleting Records

Patient records may only be deleted using the Delete Record button at the top of the Patient Information screen. Deleting a patient here deletes all information related to that patient: addresses, phone numbers, activities, and invoices.

Activities may be deleted individually by selecting a given activity under the Intakes and Activities tab, and clicking on the Delete button at the top of the screen.

Invoices (HCFAs or superbills) may be deleted individually by clicking on the Delete button at the top of the individual invoice's screen.

BE ADVISED! When you delete a record, you are permanently discarding the data you entered in all the fields in that record! THERE IS NO WAY TO BRING BACK DELETED RECORDS UNLESS YOU HAVE MADE A BACKUP OF THE FILE.

Printing

Print buttons are available at the top of appropriate screens (i.e., when creating new activities, reports, or viewing invoices). Existing activities may be printed by clicking on the printer button at the far right side of each line-item activity under a given patient's "Intakes and Activities" tab. Each invoice may be printed by clicking on the Print Superbill or Print HCFA button at the top of an invoice. To print all outstanding invoices for a given patient (or all patients), use the "Print Outstanding Invoices" report on the Reports screen.

To print all invoices for a given patient, go to that patient's Billing tab, select a pre-existing invoice or create a new one, and then click on the "View as List" button at the top of the screen. From View as List mode, you may print all of the patient's invoices on either HCFA 1500 forms or superbills by clicking on the appropriate button at the top of the View As List screen. These buttons are also available at the top of the Payment Entry screen. When the option to print comes up, be sure that the selection at the top of the print screen is "Records Being Browsed," and that you have selected "All" pages. Otherwise, you will only get one line of text or one invoice.

To Change The Look Of Invoices Or Activities

If you own FileMaker Pro 5.5 or higher for Mac or PC, and know the program well, you may change the look of your faxes, intakes, call records, patient progress reports, and/or patient invoices/superbills. To do this,

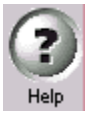
1. Open FileMaker Pro.

2. From within FileMaker Pro, go to File, Open.

3? To change the look of activities such as faxes, intakes, call records, or patient progress reports, open the Activities database from within the AcuBase™ folder on your hard drive and go to each respective activity's print layout. To change the look of invoices/superbills, open the Billing database and go to the "Detailed Intake Print" layout.

NOTE: Trigram Software support will NOT assist you in the event that you attempt to change default layouts and/or lose data after modifying the Activities or Billing databases. If you decide to modify these files, it is assumed that you know and understand the intricacies of FileMaker Pro, and you do so at your own risk!

Getting Help



To get help from any screen, simply click on the “Help” button for that screen.

Getting Out of the Patient Information & Billing Database

To get out of the Patient Information & Billing database, simply click on the Main Menu button or go to the File menu and select “Exit” or “Quit” to exit out of AcuBase™ completely.

Chapter 5: Electronic Billing with AcuBase™

Electronic Billing Overview

The electronic billing capabilities of AcuBase™ represent some of the many ways that the program can grow along with your practice. Once the initial set-up is completed, you will soon find your practice realizing the great benefits of billing electronically. These benefits include:

- Greatly reduced invoice processing time on your end
- Faster payment from insurance companies
- Monetary savings with the elimination of envelopes, paper, and stamps
- Saving of personnel costs with the elimination of the need to print, stamp, and send out claims
- Compliance with new Health Insurance Portability and Accountability Act (HIPAA) regulations

About Electronic Billing (E-billing)

Electronic billing is fast becoming *the* standard way of submitting medical claims. In fact, by 2003, the Health Insurance Portability and Accountability Act of 1996 (HIPAA) will require that all medical insurance entities be capable of receiving and processing electronic claims.

The current, standard way of submitting claims is to print each invoice onto a HCFA 1500 form or superbill and submit each through the mail or by fax to the appropriate insurance company associated with each patient. With electronic billing, you prepare claims within AcuBase™ the same way you always do as if you are planning to send them through regular mail ("snail mail"). The difference comes when it is time to submit the claims.

Instead of printing up each claim, putting it into an envelope, and sending it off by snail mail, you leave the invoice (claim) unprinted. You then instruct AcuBase™ to create a "batch" file which has all of the claims in it. This is also likened to "printing to a file—" creating a file with all of the current invoices in them (instead of printing them to paper). It is called a "batch" file because it usually contains more than one invoice for more than one patient.

Next, this batch file is sent through the Internet to a billing clearinghouse, where it is automatically opened, and the data for each invoice is sent electronically to each individual insurance company. The billing clearinghouse is an outside company which does all of the processing for you, and usually bills at a monthly rate depending upon the size and nature of your practice. (A multiple-provider office or billing service will obviously require more processing than a part-time, single provider practice.)

Some of the great advantages of using electronic billing include getting paid a lot faster; saving the time, money, and equipment required to print and mail out claims; and instant reporting. The billing clearinghouse will usually give you a report related to the batch you have sent them within 24 hours detailing if certain data was missing from certain claims, if the processing went through without errors, etc. All that you need are a connection to the Internet, a billing clearinghouse, and AcuBase. After successful electronic claim submission, you will often get paid by the insurance company up to 90% faster than through paper claims that you snail mailed.

Setting Up and Using Electronic Billing In AcuBase™

Using electronic billing in AcuBase™ involves a few simple steps:

1. Setting up a relationship with a billing clearinghouse;

2. Setting the Preferences in AcuBase™ for E-billing; and

3. Using AcuBase™ and the Internet to submit claims to the billing clearinghouse.

Let's go through these steps one at a time:

1. Setting Up A Relationship With A Billing Clearinghouse

As stated above, instead of printing out your invoices/claims, you will submit them in a file through the Internet to a billing clearinghouse. The clearinghouse will then open this file and submit each invoice individually, electronically, to each insurance company. The clearinghouse will usually charge you on a monthly basis for the use of their services.

AcuBase's billing system creates a batch file designed to be submitted to a billing clearinghouse called Abrea Technologies, Inc. (Abrea). In order to use the electronic billing capabilities of AcuBase™, you will need to set up a relationship with Abrea as follows…

A. You will first need to set up the appropriate contract with Abrea depending upon the size of your practice. Your AcuBase™ CD contains a folder / directory called "Ebilling." Within that folder are three Microsoft Word documents: 4995.doc, 6995.doc, and 125.doc. If you are billing as a single provider, open the 4995.doc document. If you are billing for a group of up to three providers, open the 6995.doc document. If you plan to bill for labs and ambulance fees as well, open the 125.doc document. Each document already has the Trigram Software logo and contact information on the top to alert Abrea that you are using AcuBase™ as your billing software.

B. Read, fill out, and sign the appropriate contract, and fax it to the Abrea Contracts Department at (973) 286-3776. At the time of this writing, AcuBase™ customers are charged a set-up fee of $49.99. The fees per month for unlimited claims are: $49.95 for single provider clinics; $69.95 for multiple providers (AcuBase™ allows up to 3 providers); and $125 if you also plan to bill for labs and ambulance fees. For further details, you will need to contact Abrea directly.

C. An Abrea representative should contact you within 2 business days after receipt of your contract to review their costs and procedures with you and set up an online account name and password which allows you to submit electronic claims.

Note that, at the time of this writing, some insurance companies do not accept bills electronically. Trigram Software is not responsible in any way for any insurance company's e-billing policy. It is your responsibility to know when a company does not accept electronically-submitted claims.

Abrea also gives you the option of signing up for a paper claims service. Any claim that is denied because the insurance company does not accept electronic claims will automatically be printed on paper and mailed directly from Abrea. For more information on this or any other Abrea service, contact Abrea Customer Service at (973) 353-6209 Monday through Friday Eastern Standard (east coast) time. You may also check their website at http://www.abreaedi.com, email them at support@claimsdispatch.com, or write to them at:

Abrea Technologies, Inc.
P.O. Box 1358
Newark, NJ 07101

2 Setting The Preferences In AcuBase For E-billing

Once you have established a relationship with Abrea and have a user name and password, you will need to let AcuBase™ know that you would like to use its electronic billing features. To do this, simply go to the Preferences button from the AcuBase™ Main Menu, choose the "More…" tab, and then the "E-billing Setup" tab. Set the "Electronic Billing is Currently Set To:" field to "On." That's it!

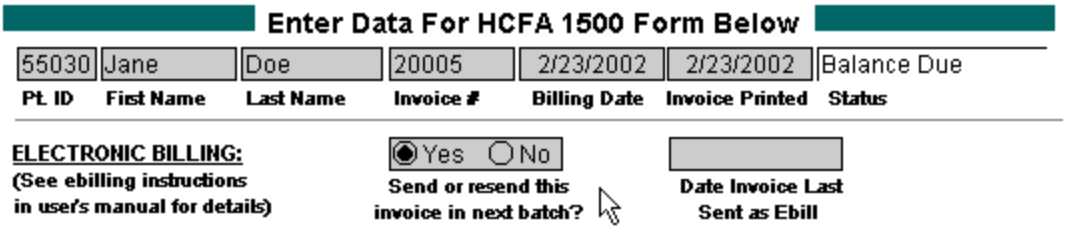
Once E-billing is set to "On," the electronic billing section at the top of each invoice on the HCFA Entry screen will also be active each time you create a new HCFA invoice (see "Creating A New HCFA Form Entry" in the *Patient Information and Billing* chapter of this user's manual).

3 Using AcuBase and the Internet to Submit Claims to the Billing Clearinghouse

Now that you have a relationship with a clearinghouse, a name and password for submitting claims through their secure website, and have turned on the E-billing features in AcuBase™, you are ready to do electronic billing. Doing E-billing is a matter of A-B-C:

A. *Do your billing the way you always do, by creating a new HCFA invoice for each patient* per the HCFA entry instructions in the "Using the Patient Information and Billing Database" chapter of the AcuBase™ user's manual.

Now that E-billing has been activated within the program, each time you create a new invoice, the "Send or resend this invoice in next batch?" field at the top of the HCFA Entry Screen is automatically set to "Yes."



When you have finished entering each invoice, you do not need to print it unless you wish to do so for your reference, as the claim will be submitted electronically.

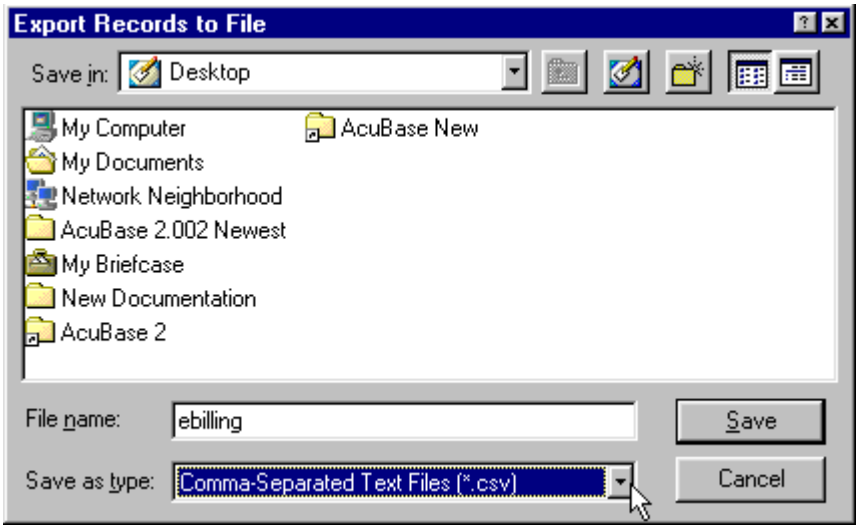
B. *Create a batch file to send all of the current, unbilled claims to the clearinghouse*.

Assuming you are doing billing for several different patients and perhaps several different patient visits, you would normally wait until you have many claims to submit. (How many claims you "save up" to bill is up to you, and may depend upon the volume of your clinic. If you see at least 10 people per day, we recommend submitting at the end of each day. If you have a lower volume business, you may wish to submit at the end of each week.)

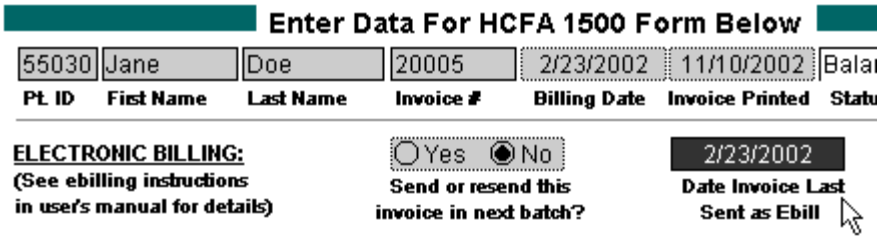
Once you have prepared your billing to be submitted, rather than printing the invoices out, you will prepare an E-billing "batch" or "batch file" by going to the Reports button from the Main Menu or within the Patient Information database, and choosing the "Create Electronic Billing Batch" report. (You may also go to the Commands menu from within Patient Information to select this report, or use Cntrl+0 [Command+0 on the Macintosh] from within the Patient Information database.) The report will automatically find all of the invoices that have not yet been submitted. (All of the invoices for which the "Send or resend this invoice in next batch?" field at the top of the HCFA Entry Screen are set to "Yes." If you wish to include any invoices that were previously sent in order to resubmit them for any reason, simply go to that invoice, and set this field to "Yes.")

If you have not set the AcuBase™ Preferences to do E-billing (see #2, above), or you have no current invoices ready to send (per the above-mentioned "Send or resend this invoice in next batch?" field), AcuBase™ will give you an error message to that effect.

As part of the "Create Electronic Billing Batch" report, a window will appear asking you to name the new batch file. This file will contain all of the current bills to be sent to the insurance companies. We recommend that you give this file a consistent name, such as "ebilling." Also be sure that "Save as type" at the bottom of this window is set to "Comma-Separated Text Files." Save the file to a place you can remember on your computer. By default, it will be saved into your AcuBase™ folder (on a PC, this is C:\Program Files\Trigram Software\AcuBase). Each time you create a new batch file for future E-billing, you may wish to keep the file name the same, replacing the old file so that you know you are always sending the correct, most up-to-date file.



Once you have created a batch file, each invoice that was sent as part of the file will have its "Date Batch Last Sent" field updated with the date you created the batch. This field can be seen at the top of the screen in the electronic billing section of the HCFA Entry Screen. AcuBase™ will also update the "Date Printed" field for each invoice when a claim has been sent as part of a batch.



In the following step, you will send your batch file to the billing clearinghouse.

C. *Send the new batch file in for electronic processing*. Now that you have created your batch file and remember where you saved it on your computer, you should do the following:

(1) Close or minimize AcuBase™.

(2) Get onto the Internet, preferably using Microsoft's Internet Explorer. (AOL users, you can open your AOL account, and then find and open Internet Explorer with AOL open at the same time. Internet Explorer is pre-installed on all Windows-based machines.)

(3) Go to Abrea's website, http://www.abreaedi.com, and select the "Members" button on the left side of the screen.

(4) Enter the user name and password supplied by Abrea.

(5) Click on "Download Files" or "Send Claims"

(6) Use the "Browse" button to find and select the batch file you created, in Step B, above, and then click on the "Upload" button.

That's it!

Note that the above were the appropriate screens on Abrea's website at the time of this writing, but Trigram Software has no control over Abrea's website, or their file submission policies or practices.

VERY VERY Important E-Billing Note!

The file AcuBase™ sends to the billing clearinghouse is essentially a text file with each field of the HCFA 1500 form on it, separated by a comma. When the clearinghouse gets the file, they import it into their system, and each comma tells their system where one field (say, patient address) ends, and the next (say, patient city) begins. In this case, each comma is considered a "field delimiter" in geek speak. This also means that you should not (in fact, CAN NOT) use commas anywhere in your data. No commas in insurance company addresses. No commas in patient addresses. Commas placed anywhere in your billing-related data may cause any comma-anointed claims to fail when sent for electronic processing. This includes your name and clinic information as entered into the AcuBase™ preferences ("Jason Luban, MD" should instead be "Jason Luban MD"). Note that diagnosis and procedure descriptions are not sent as part of the batch file, so you need not worry about them.

Reporting and Status of Electronic Claims

You may access status and/or error reports related to batch files you have sent in to Abrea by going to their website, logging in (see step #3C above), and selecting the "Reports" link on the left side of the screen. Any issues with Abrea's reporting or claims submission processes should be addressed to them directly. Contact Abrea Customer Service at (973) 353-6209 Monday through Friday Eastern Standard (east coast) time. You may also check their website at http://www.abreaedi.com, email them at support@claimsdispatch.com, or write to them at:

Abrea Technologies, Inc.
P.O. Box 1358
Newark, NJ 07101

Reports related to the invoices themselves may be run like any other billing report by clicking on the Reports button from within the Patient Information and Billing database. You may also go to the Reports button from the Main Menu and select the Billing tab to access these reports. See the Reports section of the Patient Information & Billing Database chapter in this user's manual.

Important note for E-billing users: In HCFA box number 33, only the provider name, not the company, will be processed electronically, so be sure you have entered a provider name in the AcuBase™ Preferences.

Chapter 6: The Insurance Company & Referral Databases

Insurance Company and Referral Sources Databases Overview

The Insurance Companies and Referral Sources databases are a place for you to enter commonly-accessed insurance company and referral source information. These databases allow you to:

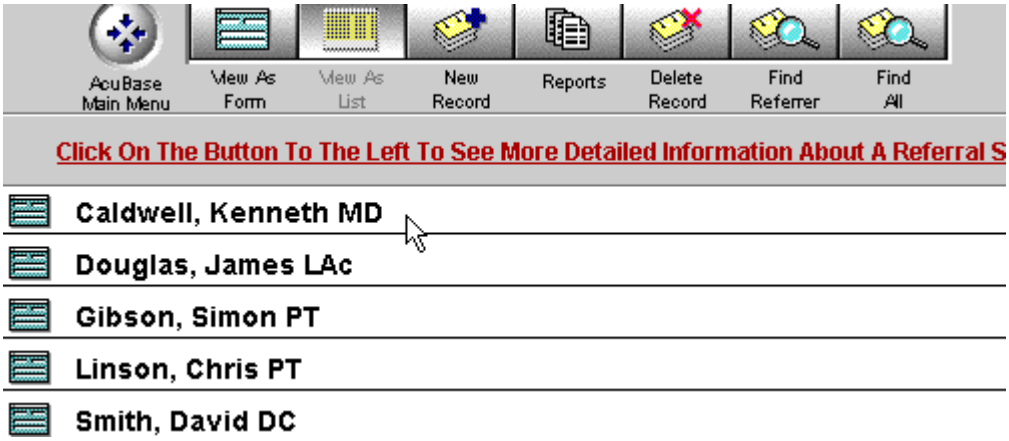
- Enter an unlimited number of insurance companies or referrers.
- Keep this information current in one place, and have it auto-entered into the appropriate places in the Patient Information and Billing database.
- View lists of which patients were referrer by which referral sources, as well as which patients have a given insurance company.
- Print insurance company or referrer mailing labels, envelopes, or phone books.

Using the Insurance Company and Referral Sources Databases

To open the Insurance Companies or Referral Sources databases, simply click on the appropriate button from the Main Menu. Upon opening either database, you are presented with all of the records/data related to that subject in list format. To see more details about a given insurance company or referral source, you may easily switch to Form View by pressing a button located next to the name, or clicking on the "View As Form" button at the top of the screen.

View as List Mode

Upon click on the Insurance Company or Referral Sources databases from the Main Menu, you are taken directly to View As List mode, with your insurance companies or referral sources sorted and presented in List format. If you want more details on a given record or to change anything about that record, simply click on the box/button to the left of that record to view the record as a "form" (this does the same as the "View as Form" button at the top of the screen).



View as Form

View as Form, or "Form View," shows individual records and their details. As stated above, you may see details on any record by clicking on the "View as Form" button or clicking on the box/button to the left of that record to view the record as a "form."

Form View is where you want to be to enter new information about any given insurance company or referral source, as well as to perform "finds." It is also the screen you will be taken to when you choose to enter a new record (by clicking on the "New Record" button at the top of any screen).

Adding New Records and Modifying Existing Records

To enter a new record into any database, click on the "New Record" button. AcuBase™ will then give you a blank record into which you may enter whatever you please.

To enter or modify data, simply click in a field and/or tab between fields. If you need to use more room than the field appears to hold, go ahead. Each field will only show a finite amount of data on the screen, but will actually accommodate an almost unlimited amount of information. Note that, while field size is virtually unlimited, fields with an abundance of information will only show a small amount of that information when printed!

Finding Records

To perform a "find," simply click on the "Find Record" button. A blank screen will appear from which you may enter the information you wish to find into the appropriate fields. Simply enter the information (or any part of it) into the appropriate fields, and click on the "Find" button or hit the Enter or Return key on your keyboard. To see how many records were found, click on the "View as List" button near the top of the screen.

Like any other find request, the Find feature in the every part of the AcuBase™ database follows the rules of a find given in Chapter 2, under "Finding Records." Refer to that section for more detailed information on finding records.

Find All

Once you have done a find for a set of records, only those records are available to view from that point forward. To bring all records back into the "found set," click on the "Find All" button, or choose "Find All" from the Select menu.

Deleting Records

To delete items from any database, simply click on the "Delete Record" button. You will be given the option of canceling the delete process before it is finished. Once you confirm the deletion, *you will not be able to recover that record!* AcuBase™ automatically saves changes as they are made, so deletions are permanent. Always keep backups of all of your data!

Reports

To create a report, you must first find and sort the records that you want in your report (see "Finding Records" above). Once you have found and sorted the records you would like to include, click on the "Reports" button at the top of the screen. This will take you to the Reports window, where you may choose one of four reports.

Avery 5160 and 5162 Labels

This report prints insurance company or referral source names and addresses onto standard Avery-brand 5160 and 5162 labels.

#10 Envelopes

This button prints one or several insurance company or referrer names and addresses onto #10-sized envelopes. Note that each printer is different, so the way that you are required to load envelopes into your printer may vary.

Phone Book

This report prints a phone book of all insurance companies or referral sources, as well as their contact information.

Getting Out of the Insurance Company or Referral Sources Databases

To get out of any database, simply click on the Main Menu button to go to the AcuBase™ Main Menu. If you wish to quit out of AcuBase™ completely, go to the File menu and select "Exit" or "Quit" from within any part of the program.

Chapter 7: Using The Inventory Database

Inventory Database Overview

Who could say they have a comprehensive office management solution without including an inventory tracking system? If we sell products of any kind, we need to know how much of each product we have on hand, how much we have sold, taxed, etc. In a busy practice and without any guidance, keeping track of such inventory can be unmanageable. But with AcuBase™, inventory tracking is not only manageable, it's easy!

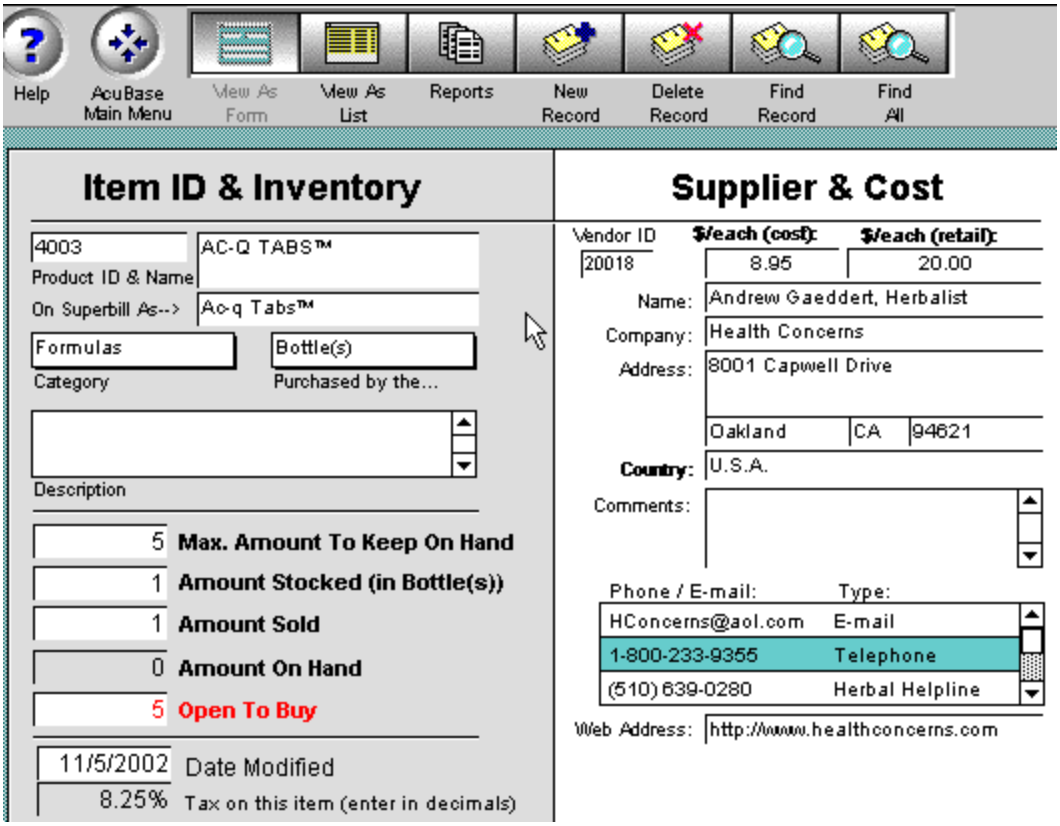
The AcuBase™ Inventory database includes:

- The ability to keep track of an unlimited number of items.
- Full integration with the rest of AcuBase™. Automatic adjustments of available inventory as items are sold to patients. All vendor information is related to each item in inventory.
- The option to set prices and even taxes on an item-by-item basis.
- The ability to create categories (such as "Needles," "Supplements," or whatever other category you may wish to use to classify the kinds of items you wish to track).
- An intelligent "feeler" that tells you the last time you inventoried or stocked a given item.
- Customizable fields that allow you to determine the amount of an item to keep on hand, what measurements to use (pounds, boxes, etc.), when to reorder a given item , and the number of each item currently open to buy (based on amount in stock).
- Reports that allow you to sort and print all of your inventory (or only certain categories of it) by category, by supplier, or otherwise.
- Blank inventory sheets that lists all items by category to make taking a manual inventory at your office(s) quick and easy.
- Standard Avery labels for all items that include the amount to keep in stock and the supplier for each item.
- Context-sensitive help at every turn.

Using the Inventory Database

Upon opening the "Inventory" database from the Main Menu, you are taken directly to the "List View" of the Inventory database. At this point, all of the inventoried items in the database are presented in order of their Product Names. You may choose to view (sort) inventory items by Category (supplements, needles, etc.), Name, Vendor, or by the items that you most need to buy (Open To Buy) by clicking on the icon next to each of these categories. If you want more details on a given item in the database or to change anything about that record, simply click on the button to the left of it to view the record as a "form" (this does the same as the "View as Form" button at the top of the screen). To go from one record to the next in Form View, simply click on the arrow buttons to go forward or backward. Context-sensitive help is available from every screen. Just look for the "?" button at the top and/or bottom of the screen.

The Form View screen may be broken down as follows:



Product ID: Every record requires a unique Product ID, or product identification number. The Product ID may be the number assigned to it by the product's vendor, or any other alphanumeric system you may wish to use. This field helps AcuBase™ index each record, which is important when it comes time to bill for products. If you fail to enter anything in this field, AcuBase™ will generate an error message.

Product Name: This is a short name for the item you are inventorying. Examples of Product Names might be "Carbo 1.5 inch needles" or "St. John's Wort 90 Tabs."

On Superbill As—>: This field shows the name of the item as it will appear on a patient's invoice. This field will default to showing the same name as the Product Name field. This field must be unique from other entries in the database, so, if you have multiple database entries for a given product (say, one entry of a supplement with 120 tablets, and another of the same supplement with 300 tablets), you should name each something unique, such as "Patent Formula 300 tabs" and/or "Patent Formula 120 tabs." This way, you can differentiate the two entries when filling out the patient's invoice.

Category: This is a one- or two-word description of the class of the item you are inventorying. Examples included with AcuBase™ are needles, herbs, formulas, and miscellaneous. You can edit these items or add your own by going to "Edit…" (an option when you click on the Category field).

Purchased by the…: This field reflects the units that the item is bought by. For instance, when you buy 1.5 inch needles, you would probably buy them by the box, so you would put "box(es)" in this field. For herbs, you may buy them by the ounce(s) or pound(s), so you would select that. Like the Category field, you may modify and/or add to these values by selecting "Edit…" (an option when you click on the Purchased by the… field).

Description: Enter a full description of the item (as long as you would like) in this field, and/or any significant details related to it.

Max. Amount to Keep on Hand: This is where you enter the amount of this item that you would ultimately like to keep in stock when you have all that you need. In other words, if you like to keep 5 boxes of needles in stock, but no more, then you'd want to enter "5" into this field. AcuBase™ uses this field when calculating the amount of an item that is open to buy by subtracting the amount you have on hand from the max. amount to keep on hand. For each new record that is created, AcuBase™ auto-sets this field to 5.

Amount Stocked…: This is where you enter the total amount of the item you have stocked. Add to this number each time you restock a given item.

Amount Sold: This field tells you how many units of this item you may have sold since last stocking it. This field connects to your patient invoices to determine the total amount of a given item you have sold.

Amount On Hand: This is how much you have in stock based on how much you have stocked minus how much you have sold of a given item.

Open to Buy: This field subtracts the maximum amount of an item you want to keep on hand from the amount actually stocked and sold to determine if and how much of an item is open to buy.

Date Modified: This field automatically updates itself each time you update information related to a given inventory item.

Tax On This Item: When you add a new record to the Inventory database, this field auto-fills with the tax rate you entered for Products in the AcuBase™ Preferences (from Main Menu). You can reset thus amount here on a per-item basis, and it reflects as tax added to this item's retail price when you sell to a patient.

Supplier & Cost: These fields relate to the supplier of this item. Start by clicking on the ID field. This will give you a pop-up list of all vendors in the Vendor Information database. If the supplier of this item is already in that list, select their name, and their information will automatically appear in the fields below. If they are not in the list, you will need to add them into the Vendor Information database first (see instructions on the Vendor Information database). The ID numbers are supplied by AcuBase™ and may not be modified. While most fields that auto-fill may only be modified from within the Vendor Information database, you may add or edit information in the Comments, Phone/E-mail, and Web Address fields.

Enter the cost to you when you buy this item (Cost) and the amount that you charge for this item (Retail) into the appropriate fields. These fields' currencies (whether in dollars, British pounds sterling, French francs, etc.) may be modified through the "Money / Billing" tab under "Preferences" from the AcuBase™ Main Menu. While entering the cost of the item is optional, you must enter a retail price in order to bill patients for a given item.

Use the Comments field to enter any general information about this supplier. Information entered here will be entered into the "General Comments" field for this supplier in the Contacts database, as well.

Adding New Items to the Inventory Database

To add a new item to the Inventory database, simply click on the "New Record" button. You will be given a new, blank record into which you may enter all of the information related to the item. To enter data, simply click in a field and/or tab between fields. If you need to use more room than the field appears to hold, go ahead. Each field will only show a finite amount of data on the screen, but will actually accommodate an almost unlimited amount of information. You may enter an unlimited number of telephone numbers and e-mail addresses for your supplier as well. Each time you add one, a new, blank line will appear below it, allowing you to add another.

Deleting Items in the Inventory Database

To delete items in the Inventory database, from Form View, simply click on the "Delete Record" button. You will be given the option of canceling the delete process before it is finished. Once you confirm the deletion, *you will not be able to recover that record*. AcuBase™ automatically saves changes as they are made, so deletions are permanent. Always keep backups of all of your data!

Finding Records

To perform a "find," simply click on the "Find Record" button from any given layout. A blank screen will appear that shows the fields that you can find by. Simply enter the information (or any part of it) into the appropriate fields that you would like to find, and click on the "Continue" button on the left side of the screen. If only one record was found, that one record will be shown in Form View. If more than one record is found, you will be taken directly to View as List to see a list of the found records.

Like any other find request, the Find feature in the Inventory database follows the rules of a find given in Chapter 2, under "Finding Records." Refer to that section for more detailed information on finding records.

Find All

Once you have done a find for a set of records, only those records are available to view from that point forward. To bring all items in the Inventory database back into the "found set," click on the "Find All" button (available from any layout).

Using the "Forward Record" and "Back Record" Buttons

From within Form View screen, you will see a Forward Record and Back Record button at the top-right side of the screen. If you have more than one item in inventory, clicking on these buttons should step you through each item alphabetically. If these buttons appear not to do anything, try clicking on the "Find All" button at the top of the screen first, and then try the Forward or Back buttons again.

Sorting Records

This is the sort button. While the Inventory database defaults to sort by the Product Name of each item, the user may also choose to sort and view items by Category, Vendor, or by the items that you most need to buy (Open To Buy) by clicking on the icon next to each of these categories. If you wish to sort by other fields that do not have the sort button next to their respective field name, you may go to the Mode pull-down menu and select "Sort…"

Reports

To print and/or view reports from the Inventory database, click on the Reports button. This takes you to a screen where you are given the option of ten different reports. When you click on any of the report button options, the report will either preview, and then print; print only; or preview only. It depends on how you set the Printing Options field in the "Miscellaneous" tab under "Preferences" from the AcuBase Main Menu.

Product Inventory By Item Name
Product Inventory By Category
Product Inventory By ID No.
Product Inventory By Supplier
Blank Inventory Entry Sheets
Inventory Price List By Supplier
Inventory Price List By Category
Print Items That Are "Open to Buy" By Category
Print Items That Are "Open to Buy" By Supplier
Print Product Labels By Category (Avery 5162 Labels)
Click on any of these buttons to preview and print the report you want
NOTE: For detailed and summary reports of products sold, go to the Reports menu within the Patient Information database or click here to go there now.

Product Inventory By Item Name

This report produces a list of items by product name, also showing the supplier, amount in stock, amount open to buy, cost, and resale price.

Product Inventory by Item

Product Name	Supplier	Amt In Stock	Open to Buy	Cost	Retail
Ac-q Tabs™	Health Concerns	0	5	8.95	21.65
Astra 18 Diet™	Health Concerns	-2	7	8.95	21.65
Astra 18 Diet™	Health Concerns	-2	7	8.95	21.65

Product Inventory By Category

This report gives a summary of all of the items in the database sorted by category, and then by Product name. It details the maximum amount of that item that you would like to keep on hand, the amount currently in stock (according to the last time you took inventory), the amount in stock, the value of your current stock, and the amount currently open to buy.

Product Inventory

Product ID	Product Name	Max. # To Keep Onhand	Amt. in Stock	Value (Cost)	Open to Buy
4011	Astra C™	1	1	5.00	0
myformula1	Ba Zhen Tang +	1			1
1368	Back Support (chronic)™	1	-2	0.00	3
5045	Ease The Muscles	5	5	0.00	0
11389	Jane Anne Smith Formula	5	5	25.00	0
	Totals for this Category:		9	30.00	
Formulas					
4003	Ac-q Tabs™	5	0	0.00	5
4009	Astra 18 Diet™	5	-2	-17.90	7
4009	Astra 18 Diet™	5	-2	-17.90	7
4012	Astra Diet Tea™	5	0	0.00	5

Product Inventory By ID Number

This report gives a summary of all of the items in the database sorted by Product ID number. It also shows the product name, the company / vendor selling the product, the cost, resale price, and price with tax..

Product List By Item Number

Product ID	Product Name	Company	Cost	Resale Price	Price w/Tax
1367	Back Support (acute)™	Lotus Herbs, Inc.	10.80	20.00	21.65
1368	Back Support (chronic)™	Lotus Herbs, Inc.			0.00
1368	Back Support (chronic)™	Lotus Herbs, Inc.	10.80	20.00	21.65
1463	Liver Dtx ™ (detoxification)	Lotus Herbs, Inc.	12.95	20.00	21.65
1485	Traumanex	Lotus Herbs, Inc.	12.50	20.00	21.65
1HH500270	Hepatoplex One, Large	Health Concerns	19.95	35.00	37.89

Product Inventory By Supplier

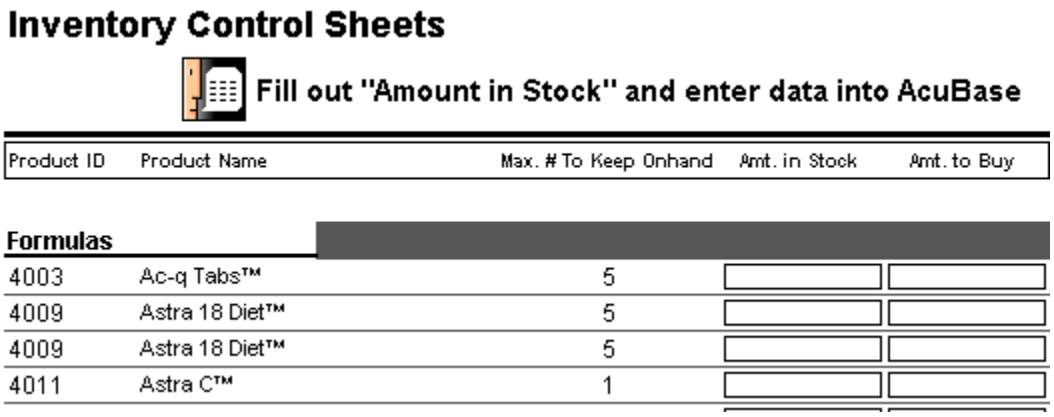
This report gives a summary of products in inventory, sorting them first by the supplier / vendor of the product, then by category, and then by the product name. The maximum amount of each item to keep on hand is also shown, along with the amount of the item currently in stock, the cost to you for each item bought, the total value of all of the quantity you currently have in inventory, and the number that are currently open to buy for each record. At the end of each supplier's list of products is the total number of items from that supplier that you have in stock, and the total value of that supplier's items. A grand total appears at the end of the report.

Product Inventory by Supplier

Supplier / Product ID	Category / Product Name	Max. # To Keep Onhand	In Stock	Cost Each	Total Value (Cost)	Open to Buy
East West Herbs Ltd.						
	Formulas					
5004	Ease The Journey--yang	3	1	11.95	11.95	2
5005	Ease The Journey - Yin	4	1	13.00	13.00	3
5065	Strengthen The Root	2	-1	16.00	-16.00	3
	Miscellaneous					
5045	Ease The Muscles	5	5		0.00	0

Blank Inventory Entry Sheets

This report is used each time you are ready to take inventory. It prints out all of the items in the Inventory database and sorts them by Category and then Product ID. It tells you the maximum amount you would like to keep on hand, and leaves open a blank box for you to enter the amount of each item in stock, and the amount to buy. Once this report is printed, you will want to fill in the "Amount in Stock" and "Amount to Buy" fields by hand as you take inventory, and then enter the appropriate values back into the Inventory database when you are done.



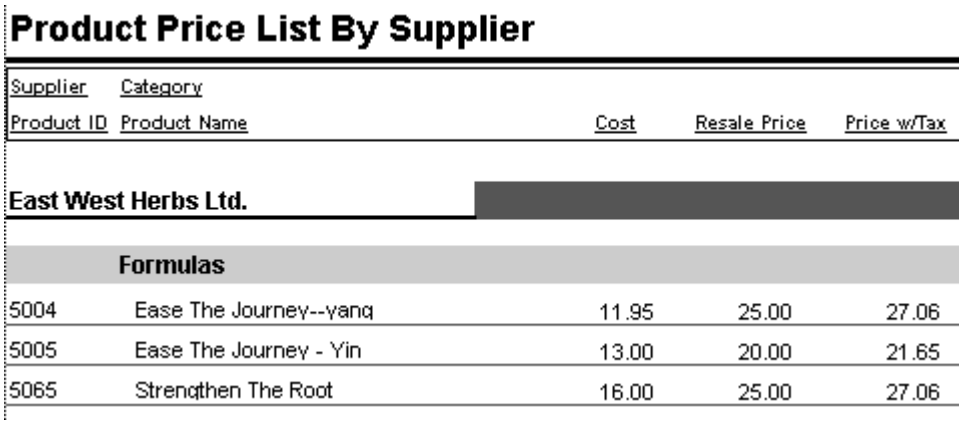
Inventory Control Sheets

Fill out "Amount in Stock" and enter data into AcuBase

Product ID	Product Name	Max. # To Keep Onhand	Amt. in Stock	Amt. to Buy
Formulas				
4003	Ac-q Tabs™	5		
4009	Astra 18 Diet™	5		
4009	Astra 18 Diet™	5		
4011	Astra C™	1		

Inventory Price List By Supplier

This report alphabetizes each supplier, then their product types, then their product names. It shows your cost, your resale price, and your resale price with tax on each item.



Product Price List By Supplier

Supplier / Product ID	Category / Product Name	Cost	Resale Price	Price w/Tax
East West Herbs Ltd.				
	Formulas			
5004	Ease The Journey--yang	11.95	25.00	27.06
5005	Ease The Journey - Yin	13.00	20.00	21.65
5065	Strengthen The Root	16.00	25.00	27.06

Inventory Price List By Category

This report alphabetizes by product type, then product name. It also shows the product supplier, your cost, your resale price, and your resale price with tax on each item.

Product Price List By Category

Product ID	Product Name	Company	Cost	Resale Price	Price w/Tax
Formulas					
4003	Ac-q Tabs™	Health Concerns	8.95	20.00	21.65
4009	Astra 18 Diet™	Health Concerns	8.95	20.00	21.65
4009	Astra 18 Diet™	Health Concerns	8.95	20.00	21.65

Open to Buy by Category

This report gives a summary of all of the items in the database where the "Max. # to Keep On Hand" field is greater than the "Amount on Hand" field. In other words, it summarizes and prints only those items that are currently open to buy by category, and then by product name. It shows the maximum amount of that item that you would like to keep on hand, the amount currently in stock (according to the last time you took inventory), the value of your stock (the cost x the amount in stock), and the amount currently open to buy.

Product Inventory

Product ID	Product Name	Max. # To Keep Onhand	Amt. in Stock	Value (Cost)	Open to Buy
Formulas					
4003	Ac-q Tabs™	5	0	0.00	5
4009	Astra 18 Diet™	5	1	8.95	4
4012	Astra Diet Tea™	5	0	0.00	5
1367	Back Support (acute)™	10	3	32.40	7

Open to Buy by Supplier

Like the report above, this report gives a summary of all of the items in the database where the "Max. # to Keep On Hand" field is greater than the "Amount on Hand" field. In other words, it summarizes and prints only those items that are currently open to buy. But this report sorts them and summarizes them by Supplier, and then by product name,

thus allowing ease in ordering supplies by allowing you to see all items that you might want to buy from a given supplier. It also shows the maximum amount of that item that you would like to keep on hand, the amount currently in stock (according to the last time you took inventory), the cost (to you) when you buy this product, the total value of your current inventory, and the amount currently open to buy.

Product Inventory by Supplier

Supplier / Product ID	Category / Product Name	Max. # To Keep Onhand	In Stock	Cost Each	Total Value (Cost)	Open to Buy
East West Herbs Ltd.						
	Formulas					
5004	Ease The Journey--yang	3	1	11.95	11.95	2
5005	Ease The Journey - Yin	4	1	13.00	13.00	3
5065	Strengthen The Root	2	-1	16.00	-16.00	3
	Totals For This Supplier:		1		8.95	

Print Product Labels By Category (Avery 5162 Labels)

This report prints labels of all of the items in the Inventory database so that you may place these labels on the shelves, boxes, containers, etc., of the items you keep in the inventory database. These labels are set up to print on Avery® 5162 labels (available at most decent office supply stores for your laser or inkjet printer). Each label has the name of the item in bold at the top, then gives the AcuBase™ Product ID number (to make finding that item in the Inventory database easy), the maximum amount of that item to keep in stock, the cost to you, your retail price, and the product supplier's name.

AC-Q TABS™
==========
AcuBase Product ID #: 4003
Max. Amount to Keep in Stock: 5 Bottle(s)
Cost: 8.95 Retail Price: 20
Supplier: Health Concerns

BACK SUPPORT (CHRONIC)™
==========
AcuBase Product ID #: 1368
Max. Amount to Keep in Stock: 2 Bottle(s)
Cost: 10.8 Retail Price: 20
Supplier: Lotus Herbs, Inc.

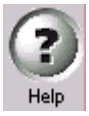
ASTRA 18 DIET™
==========
AcuBase Product ID #: 4009
Max. Amount to Keep in Stock: 5 Bottle(s)
Cost: 8.95 Retail Price: 20
Supplier: Health Concerns

BACKBONE
==========
AcuBase Product ID #: 4016
Max. Amount to Keep in Stock: 5 Bottle(s)
Cost: 8.95 Retail Price: 20
Supplier: Health Concerns

Detailed and Summary Reports of Products Sold

Reports related to products you have actually sold may be run from Reports button within the Patient Information and Billing database (also accessible from the Main Menu by clicking on the Reports button, then the Billing tab). You may go directly to the Patient Information and Billing Reports screen from the Inventory reports screen by clicking on the related message at the bottom of the Inventory Reports screen.

Getting Help



The help screens in the Inventory database are some of the most impressive in all of AcuBase™. To get help from any screen, simply click on the “Help” button at the top of that screen.

Getting Out of the Inventory Database

To get out of the Inventory database, simply click on the Main Menu button or go to the File menu and select “Exit” to exit out of AcuBase™ completely.

Chapter 8: The Vendor Information Database

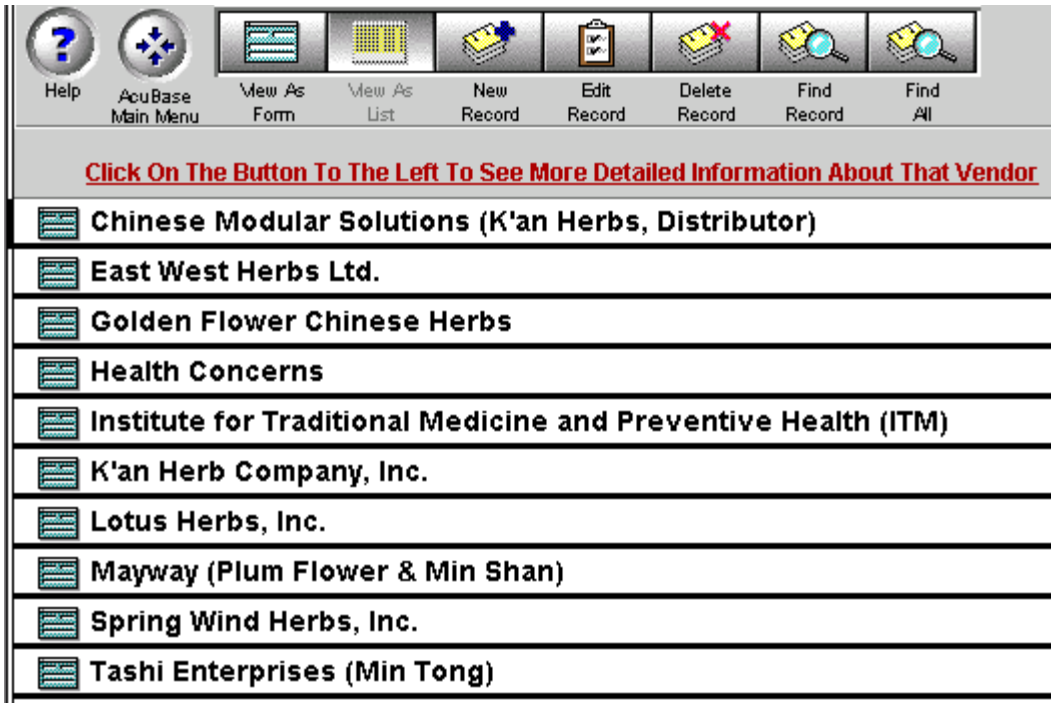
Vendor Information Database Overview

Not only does AcuBase™ come with thousands of records in its Reference Library, and many useful practice management tools, but you may also enter information related to your top inventory suppliers. In addition, for those who use Oriental medical supplements, we have already entered information from top suppliers. Trigram Software has been given permission from some of the world's top suppliers of herbs, formulas, patent formulas, Oriental medical information, and related supplies to include their vendor and product information in our databases. We have poured much of this information into our Patent Formulas and Vendor Information databases. The Vendor Information database allows you to:

- Keep track of, edit, or delete available vendor contact information, including addresses, phone numbers, and other info.
- Add, edit, or delete your own vendors and their related information.
- For each vendor, view their related patent formulas, standard formulas, herbs, and any products that you may have purchased from them and keep in inventory.
- Link directly to any related patent formula, standard formula, herb, or inventory item associated with a given vendor.
- View copyrighted information supplied to Trigram Software with permission from top vendors, including: Blue Poppy Herbs, K'an Herbs, Health Concerns, East West Herbs, Evergreen Herbs and Medical Supplies, Golden Flower Chinese Herbs, Mayway (Plum Flower and Min Shan), Chinese Modular Solutions, Spring Wind Herbs, Tashi Enterprises (Min Tong), NuHerbs, Sun Ten / Brion Herbs Corp., and the Institute for Traditional Chinese Medicine and Preventive Health.
- View available context-sensitive help at every turn.

Using the Vendor Information Database

Upon opening the "Vendor Information" database from the Main Menu, you are taken directly to "List View." At this point, all of the vendors in the database are listed alphabetically by name. Most of AcuBase's standard options are available at the top of the screen, including an "Edit Record" button, which allows you to change or add information related to any given vendor. If you want more details on a given vendor in the database, simply click on the button to the left of it to view the record as a "form" (this does the


Help
AcuBase Main Menu
View As Form
View As List
New Record
Edit Record
Delete Record
Find Record
Find All
Click On The Button To The Left To See More Detailed Information About That Vendor
Chinese Modular Solutions (K'an Herbs, Distributor)
East West Herbs Ltd.
Golden Flower Chinese Herbs
Health Concerns
Institute for Traditional Medicine and Preventive Health (ITM)
K'an Herb Company, Inc.
Lotus Herbs, Inc.
Mayway (Plum Flower & Min Shan)
Spring Wind Herbs, Inc.
Tashi Enterprises (Min Tong)

same as the "View as Form" button at the top of the screen). To go from one record to the next in Form View, simply click on the arrow buttons to go forward or backward. Context-sensitive help is available from every screen. Just look for the "?" button at the top and/or bottom of the screen.

When you go to Form View, you will notice that there are three tabs which separate vendor information into the categories of Contact Information, Vendor Literature, and Vendor Products & Inventory. This allows AcuBase™ to keep track of items properly in other parts of the program. Regardless of which tab you use, all of the layouts are the same, and may be broken down as follows:

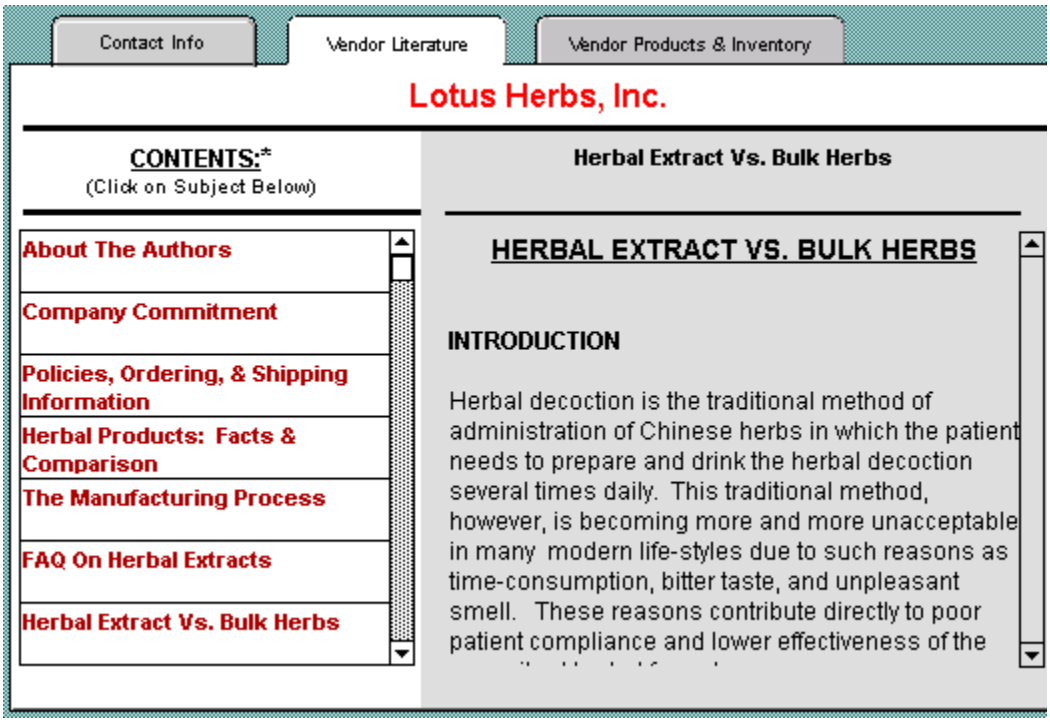
Vendor Contact Information Tab

The default Form View tab is the Contact Info tab. This tab shows up to three vendor-related logos / graphics, as well as general contact information related to each vendor. Phone and e-mail contact information, as well as comments / notes may be added to or edited here. At the bottom of the screen, where it says, "Does this vendor sell standard herbs and formulas?", a "Yes" answer to this means that the vendor sells single herbs and non-patent formulas. Answering "Yes" here also links this vendor to the Vendors tab in the Herbs and Formulas sections of the Reference Library, and will also show herbs and formulas under the "Vendor Products & Inventory" tab.

To edit the vendor address and web contact information, click on the "Edit Record" button at the top of the screen.

Vendor Literature Tab

The Vendor Literature tab shows information provided by permission from each vendor to Trigram Software for inclusion in AcuBase™. Note that all information in this section of the database, as well as vendor-related patent formulas, is protected by copyrights owned by that vendor. This is the kind of information one might usually find contained in vendor catalogs or binders, with details about dosage, diagnosis, use of vendor-related products,


Contact Info
Vendor Literature
Vendor Products & Inventory
Lotus Herbs, Inc.
CONTENTS:*
(Click on Subject Below)
About The Authors
Company Commitment
Policies, Ordering, & Shipping Information
Herbal Products: Facts & Comparison
The Manufacturing Process
FAQ On Herbal Extracts
Herbal Extract Vs. Bulk Herbs
Herbal Extract Vs. Bulk Herbs
HERBAL EXTRACT VS. BULK HERBS
INTRODUCTION
Herbal decoction is the traditional method of administration of Chinese herbs in which the patient needs to prepare and drink the herbal decoction several times daily. This traditional method, however, is becoming more and more unacceptable in many modern life-styles due to such reasons as time-consumption, bitter taste, and unpleasant smell. These reasons contribute directly to poor patient compliance and lower effectiveness of the

etc. Because each vendor provided us with varying amounts of information in many different formats (Mac, PC; Word, PhotoShop, PageMaker, Quark), we were forced to do our best to distill it all into a form and format the could be viewed in a database. In many cases, we were given books of several hundred pages (such a those from K'an, Evergreen, ITM, and Chinese Modular Solutions). While we were able to put most of the information into the database, graphics and special formatting were not copied over. Thus, if you would like further information about any of these vendors, we strongly recommend that you use the Contact Info tab to contact the vendor yourself in order to obtain their original materials.

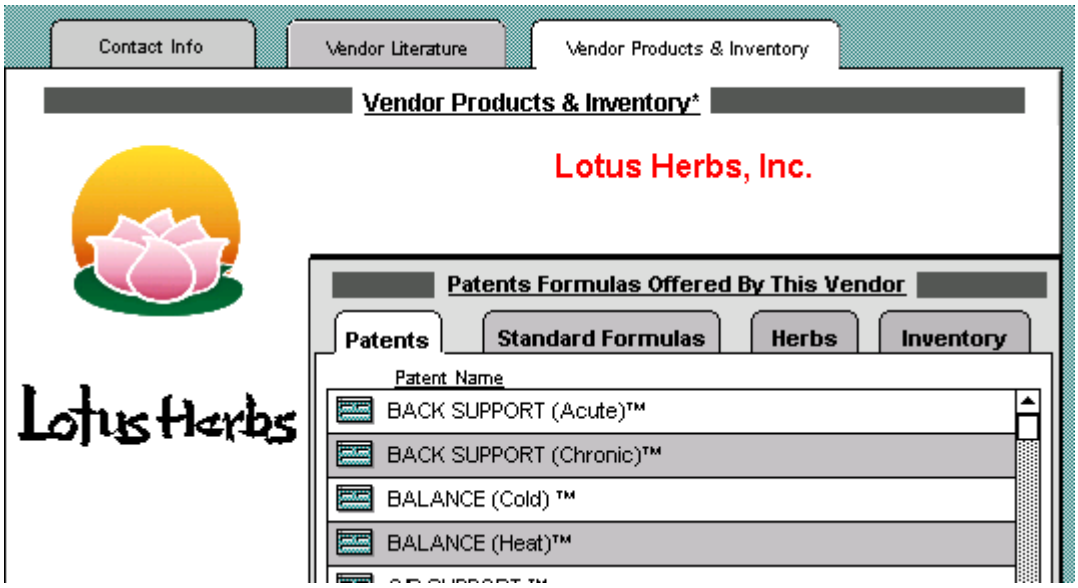
All vendor literature in the Vendor Literature tab has been organized in the same fashion. On the left side of the screen, you will see a "Table of Contents." The items in the Table of Contents are shown in the order provided to us by each vendor. Subtopics appear with a "→" to their left. To view any topic, simply click on it in the Table of Contents, and it will appear in full on the right side of the screen. If the text is longer than the viewable area of the screen, you may click into it and use the scroll bar that appears to the right of the text.

Because the information in this section of the database has been copyrighted, AcuBase™ does not permit the user to print out the vendor literature, nor the related patent formula information. Note that, while you can edit (and delete!) vendor information, AcuBase™ does not provide any means of adding or editing topics in the Table of Contents. This goes for new or existing vendors. Vendor literature information may only be added by Trigram Software. If you are a vendor and wish to be added to AcuBase's vendor information database, please contact us at 1-888-4ACUBASE.

Vendor Products & Inventory Tab

The Vendor Products & Inventory tab shows patent formulas, standard formulas, herbs, and inventory in AcuBase related to a given vendor. For many vendors, several of these tabs may have no information. For example, East West Herbs does not supply single herbs or non-patent formulas, so these tabs will not have any information in them.

To view vendor-specific patent formulas, standard formulas, herbs, or available vendor-specific inventory, simply click on the appropriate tab. If you wish to see details about a given herb, formula, or inventory item, click on the box to the left of that item. To add a specific herb or formula to inventory, click on the box to the left of that item to go to its details, and add it from there, or else add it from the Inventory database.



Note that the information that appears in the above-mentioned tabs is not exhaustive. Rather, it is solely a list of herbs and formulas that a vendor provides with are in the AcuBase™ database. While we try to get as many of the formulas and herb in our database as possible, there are hundreds of standard herbs and formulas which several vendors may offer which do not appear in the database. Call you vendor for further details.

Editing and Adding New Vendors to the Vendor Products Database

To add a new item to the Vendor Products database, simply click on the "New Record" button. This will take you to a new, blank vendor screen into which you may add new vendor information. When you are done, click on the "Contact Info" tab.

To edit any vendor record, you must be in List View or Form View's Contact Info tab layout. From either of these layouts, click on the "Edit Record" button at the top of the screen to access the "Edit Vendor Information" screen. Here you will see existing vendor information, and may edit it as you wish.

On both the "New Record" and "Edit Record" screens, you may also enter up to three logos or other graphics associated with each vendor. To delete a graphic, simply click on it and click on the backspace or delete key on your keyboard. The easiest way to place a graphic in these fields is to open your graphic in another graphics program and copy it there. Once it is copied, switch back to AcuBase™ and literally click in the graphic field and select "Paste" from the Edit menu.

You will also note that the edit and new record screens have a message on the bottom of the screen that reads "Does this vendor also provide standard herbs and formulas?" If you click on the "Yes" radio button, this vendor will be connected to all of AcuBase's standard herbs and formulas. Thus, when you go to the "Vendor Products & Inventory" tab for this vendor, you will see lists of herbs and standard formulas related to that vendor. If you do not select "Yes" on this screen, the standard herbs and formulas tabs will remain blank.

Once you have added a new vendor, that vendor will appear in future pop-up lists in the Patent Formulas and Inventory databases.

Finding A Vendor

To perform a "find," simply click on the "Find Record" button from any given layout. A blank screen will appear that shows the fields that you can find by. Simply enter the information (or any part of it) into the appropriate fields that you would like to find, and click on the "Continue" button on the left side of the screen. If only one record was found, that one record will be shown, and you must click on a tab to go back to the main database. If more than one record is found, you will be taken directly to View as List to see a list of the found records.

Like any other find request, the Find feature in the Vendor Information database follows the rules of a find given in Chapter 2, under "Finding Records." Refer to that section for more detailed information on finding records.

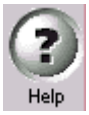
Find All

Once you have done a find for a set of records, only those records are available to view from that point forward. To bring all items in the Inventory database back into the "found set," click on the "Find All" button (available from any layout). This will take you back to the "View As List" screen, where you may see all available vendors in the database in alphabetical order.

Deleting Items in the Vendor Information Database

To delete items in the Inventory database, from Form View, simply click on the "Delete Record" button. You will be given the option of canceling the delete process before it is finished. Once you confirm the deletion, *you will not be able to recover that record*. AcuBase™ automatically saves changes as they are made, so deletions are permanent. Always keep backups of all of your data!

Getting Help



To get help from any screen, click on the “Help” button at the top of that screen.

Getting Out of the Vendor Information Database

To get out of the Inventory database, simply click on the Main Menu button or go to the File menu and select “Exit” to exit out of AcuBase ™ completely.

Chapter 9: The Reference Library Databases

Reference Library Databases Overview

Not only does AcuBase™ provide you with many great practice management tools, we have also included a free traditional Oriental medical library, complete with almost 2,000 records: hundreds of formulas, herbs, points, review questions taken from state and national board exam reading lists, and over 500 patent formulas and related information from the top vendors in the industry! While this may sound great in itself, perhaps the most valuable part of this library is what doesn't come with it: your personal clinical preferences and experiences, which each database has been designed to incorporate. That's right, the Reference Library has been designed to accommodate *your* techniques, *your* preferences, and *your* clinical experiences.

The Reference Library features:

- Almost 3,000 records: herbs, formulas, patent formulas, acupoints, a drug / herb information database, and several hundred review questions.
- Point-, herb-, and formula-specific layouts.
- Chinese characters for herbs and formulas.
- Full integration with the rest of AcuBase™. For each herb, view related formulas and patent formulas, as well as vendors who supply each herb and how much you may have in stock. For formulas and patent formulas, link directly to the vendors that supply each formula and read through vendor-supplied information; adjust your inventory; and link directly to the herbs in each formula with a click of the mouse.
- Reports that print in a variety of formats, including index cards and formulas with associated dosages and Chinese characters.
- The ability to view potential interactions between the most popular prescription and over-the-counter medications and herbal medicines, as well as a list of herbal equivalents to popular medications from John Chen, Pharm.D., D.O.M., L.Ac., founder of Evergreen Herbs and the Lotus Institute. You may also view and print extensive pharmacokinetic information written by Dr. Chen.
- The ability to add, delete, and/or edit any information in any field, and add or delete any records
- Easy, flexible searches for symptom-specific data.
- Sorting by any field with the click of a button.
- A consistent, intuitive interface.
- Context-sensitive help available from any screen.

And all the other features that made our first AcuBase™ program *the standard* for traditional Oriental medical reference software!

Using the Reference Library Databases

The Reference Library databases have been designed with an intuitive interface through every step of the design process. Every layout contains the same general template found throughout the rest of the database, such that, if one understands the basic organization of the data in one area (such as herbs), then access to and manipulation of data in another area (such as formulas or acupoints) is simple.

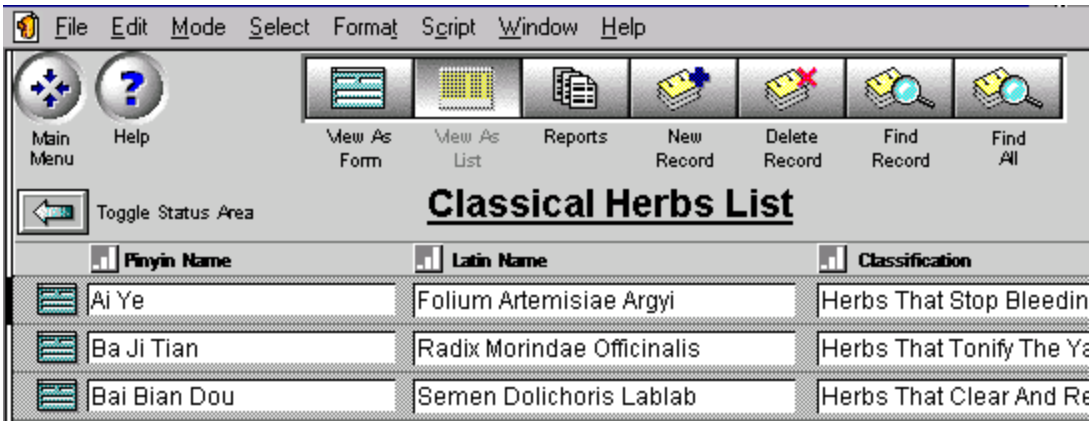
To open the Reference Library database, click on the Reference Library icon from the Main Menu, or click on any of its related topics (AcuPoints, Herbs, Formulas, Patent Formulas, Herb / Drug Interactions, or Review Topics). If you do not see the Reference Library from your Main Menu, go to the bottom of the Main Menu screen and click where it says, "To Change Your Main Menu Preference(s), click here." This will take you to the Main Menu Preferences, where you can choose to include the Reference Library as part of your Main Menu.

Upon opening any of the associated databases, you are presented with all of the records/ data related to that subject in list format. To see more details about a given acupuncture point, herb, or formula, one may easily switch to Form View by simply pressing a button located next to the name of the point/herb/formula, or clicking on the "View As Form" button at the top of the screen. Most herbs and formulas have Chinese characters included, and reports may be printed in long form, or on index cards. Herbs, points, formulas, and/or questions may be searched by any field in any layout. Finding the right points, herbs, or formulas by indication is simple and quick.

Please note that, while AcuBase comes with hundreds of acupuncture points, herbs, formulas, and review topics already provided, the information included herein is in no way intended to be a primary source, and is intended to be used only for educational reference, not as guidelines for the treatment of patients. The intent of this product is to give the acupuncturist, acupuncture student, or anyone interested in traditional Chinese medicine, a dynamic way of storing and referencing their own information. Information that was in the database at the time it was purchased is meant to serve as a template, and no more.

View as List Mode

Upon clicking on the Acupoints, Herbs, Formulas, Patent Formulas, or Exam Questions buttons from the AcuBase™ Main Menu, all of the respective points, herbs, formulas, patent formulas, or questions in the database are sorted and presented in List format. If you want more details on a given record or to change anything about that record, simply click on the box/button to the left of that record to view the record as a "form" (this does the same as the "View as Form" button at the top of the screen).



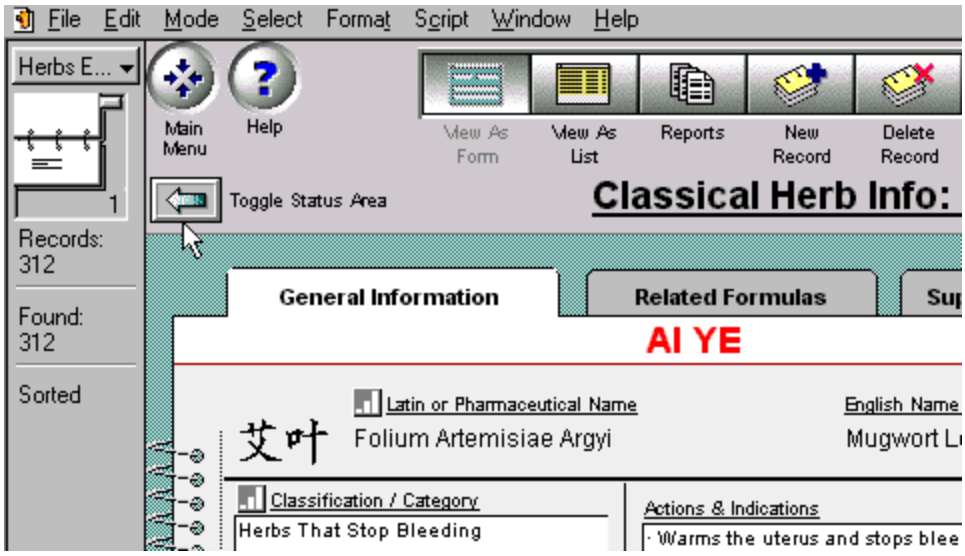
View as Form

View as Form, or "Form View," shows individual records and their details. As stated above, you may see details on any record (acupoint, herb, formula, or patent formula) by clicking on the "View as Form" button or clicking on the box/button to the left of that record to view the record as a "form."

Form View is where you want to be to enter new information about any given point, herb, formula, or patent formula, as well as to perform "finds." It is also the place to be to view herb pictures (click on the "photo" button from within the herbs form view).

Toggle Status Area

The Toggle Status Area button shows the database's "Status Area." This is simply a graphic of a card file that shows how many records are in the database, how many are being viewed, and whether or not they are sorted. This is particularly useful in Form View, as you will only be able to see one record at a time from within Form View, and may know how many records are available to view at any given time without viewing the Status Area. It is also useful after doing a "Find" to show how many records were found.



Sorting Records

This is the sort button. While the Library defaults to sort by the point number, herb name (pinyin), formula name (pinyin), patent formula name, and subject of exam question, respectively (depending on which option was chosen from the Main Menu), the user may also choose to sort and view the contents of any database by any field with a sort button located next to it. Sort by the field by simply clicking on the sort button. If you wish to sort by other fields that do not have the sort button next to their respective field name, you may go to the Mode pull-down menu and select "Sort…"

Adding New Records and Modifying Existing Records

To enter a new record into any database, click on the "New Record" button. AcuBase™ will then give you a blank record into which you may enter whatever you please.

To enter or modify data, simply click in a field and/or tab between fields. If you need to use more room than the field appears to hold, go ahead. Each field will only show a finite amount of data on the screen, but will actually accommodate an almost unlimited amount of information. Note that, while field size is virtually unlimited, fields with an abundance of information will only show a small amount of that information when printed!

Adding Chinese Characters

AcuBase's intuitive interface makes adding and deleting records simple. However, adding Chinese characters may not be as obvious as adding regular text. To add Chinese characters, the characters must be saved as an image, preferably as a PICT, EPS, TIFF, JPEG, or GIF file. Characters may then be copied from whichever graphics program it was saved in, and pasted into the Chinese field in the appropriate herb or formula layout.

Finding Records

To perform a "find," simply click on the "Find Record" button. A blank screen will appear from which you may enter the information you wish to find into the appropriate fields. Simply enter the information (or any part of it) into the appropriate fields, and click on the "Find" button or hit the Enter or Return key on your keyboard. To see how many records were found, click on the "Toggle Status Area" button near the top-left part of the screen.

Like any other find request, the Find feature in the every part of the AcuBase™ database follows the rules of a find given in Chapter 2, under "Finding Records." Refer to that section for more detailed information on finding records.

Find All

Once you have done a find for a set of records, only those records are available to view from that point forward. To bring all records back into the "found set," click on the "Find All" button, or choose "Find All" from the Select menu.

Deleting Records

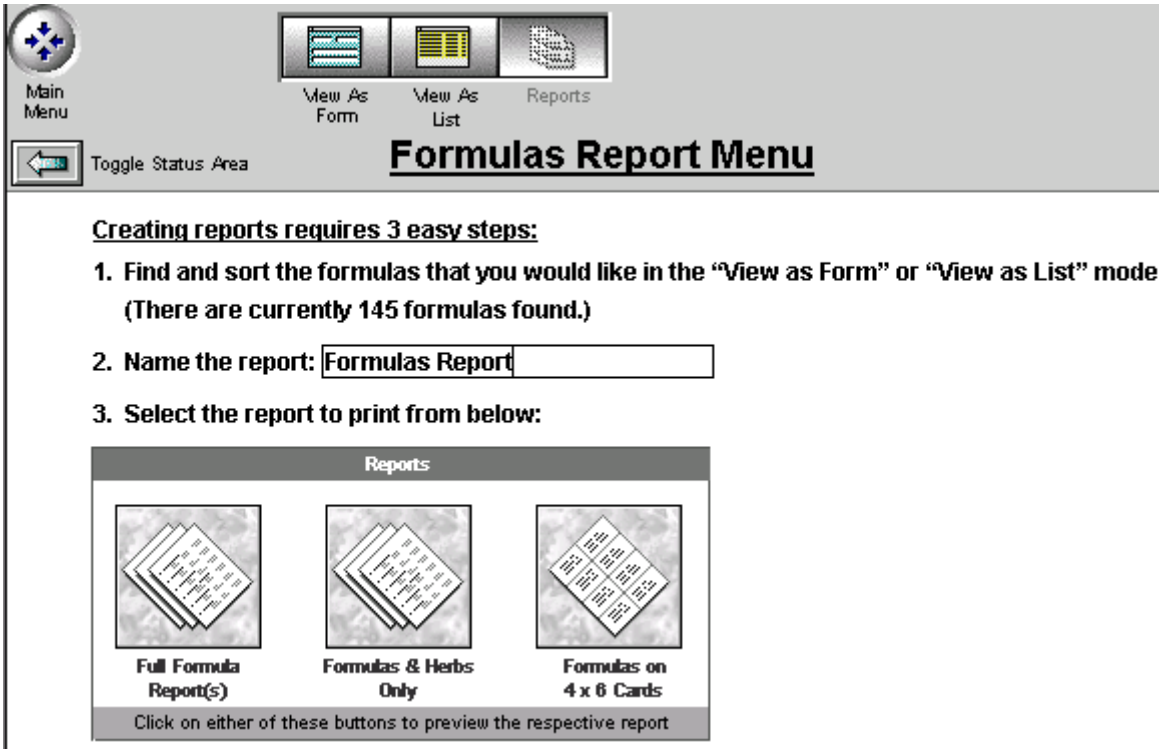
To delete items from any database, simply click on the "Delete Record" button. You will be given the option of canceling the delete process before it is finished. Once you confirm the deletion, *you will not be able to recover that record!* AcuBase automatically saves changes as they are made, so deletions are permanent. Always keep backups of all of your data!

Printing Records (Reports)

To print the exam questions, simply click on the "Print Questions" button from within the Exam Questions layout.

To create a report, you must first find and sort the records that you want in your report (see "Finding Records" and "Sorting Records," above). Once you have found and sorted the records you would like to include, click on the "Reports" button at the top of the screen. This will take you to the Reports window.

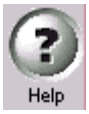
From the Reports screen, type in a name (if any) that you would like printed as the title of the report (such as "Herb Cards" or "Acupoint Report"), and then click on the appropriate report button to print that report. You are given two or three choices of reports, depending upon which database you are in. Within the Acupoints, Herbs, and Formulas databases, you may print Full Reports or Index Cards. Full Reports print, on average, two points, herbs, or formulas per page, whereas Index Cards print acupoints on 3 x 5 inch index cards, and herbs and formulas on 4 x 6 inch cards (obviously limiting the amount of information that may fit on each card). Index cards may be printed on regular 8.5 x 11-inch paper— AcuBase™ creates borders around each card so that they may be cut out and folded along the dotted line provided.


Main Menu
View As Form
View As List
Reports
Toggle Status Area
Formulas Report Menu
Creating reports requires 3 easy steps:
1. Find and sort the formulas that you would like in the "View as Form" or "View as List" mode (There are currently 145 formulas found.)
2. Name the report: Formulas Report
3. Select the report to print from below:
Reports
Full Formula Report(s)
Formulas & Herbs Only
Formulas on 4 x 6 Cards
Click on either of these buttons to preview the respective report

The Formulas database also contains a "Formulas & Herbs Only" report. This report will print one formula per page. Each page will have the formula name(s), the herbs within it, and the dosage. This report is intended for when a doctor or patient needs to go to an herb store to pick up the contents of a given formula. The report may easily be given to the herbalist to have the formula prescription filled.

Note that AcuBase™ report formats may not be modified in any way. Also note that, due to the constraints of copyright law, AcuBase does not provide reports related to patent formulas or their associated vendors' information.

Getting Help



To get help from any screen, simply click on the "Help" button for that screen.

Getting Out of the Reference Library Database

To get out of any Reference Library database, simply click on the Main Menu button to go to the AcuBase™ Main Menu. If you wish to quit out of AcuBase™ completely, go to the File menu and select "Exit" from within any part of the program.

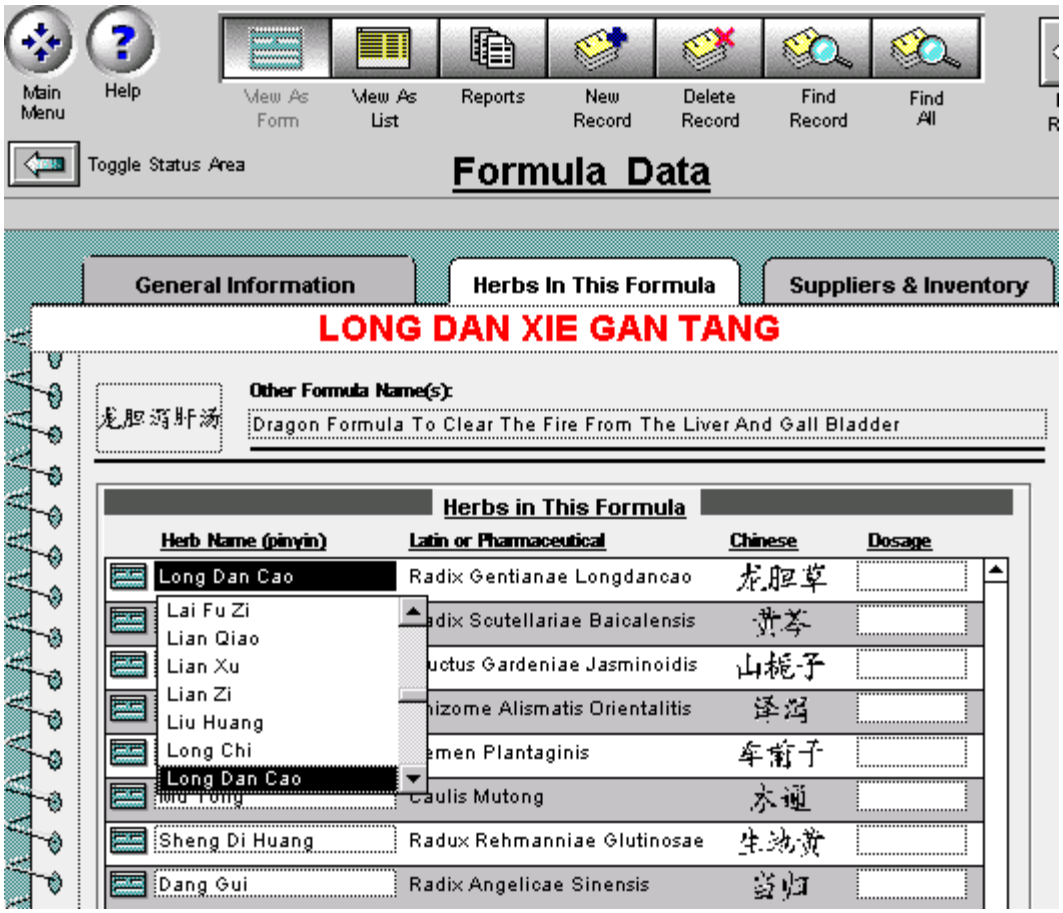
Features Specific to the Herbs and Formulas Databases

Related Herbs & Formulas

AcuBase™ has several features that take advantage of its unique relational architecture. As perennial students of traditional Chinese medicine, we constantly need to cross-references herbs within a given formula, as well as look for formulas that contain a given herb. This new version of AcuBase™ makes such cross-referencing simple and intuitive.

For each herb in the Herbs database, you may click on the "Related Formulas" tab from the "Form View" to view all related standard and patent formulas within AcuBase™ which contain the herb you are viewing as one of their ingredients. Just as in List View, you may click on the small box just to the left of each formula or patent formula, which will take you to the details of that specific formula.

Similar functions may be seen in the Formulas and Patent Formulas databases. When viewing an individual formula, clicking on the "Herbs" tab will not only show you all of the herbs in that formula, but will also allow you to go to the details of each herb by clicking on the box to its left.

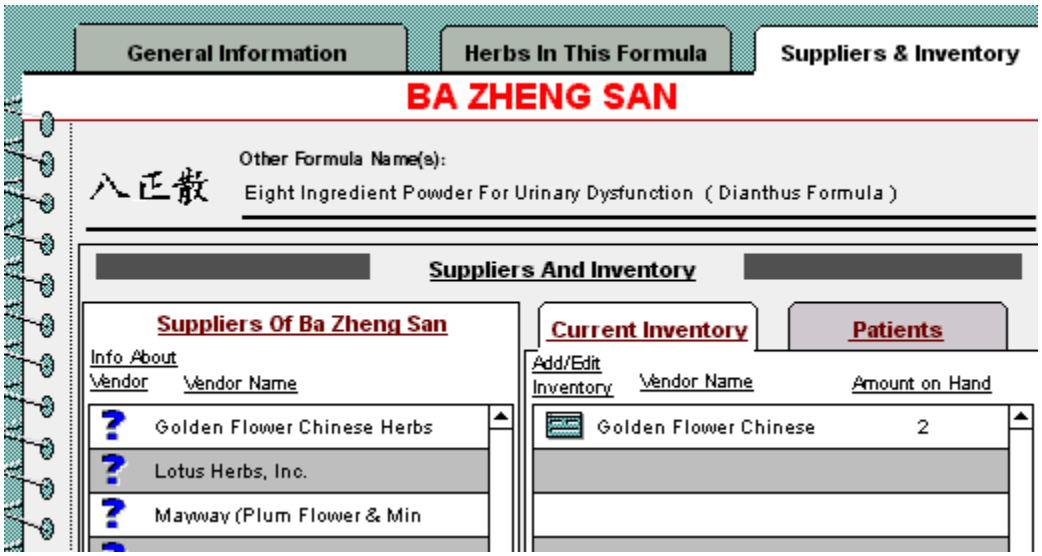


The Herbs database automatically cross-references all formulas and patent formulas that are in AcuBase™. So, if you happen to add a new herb to the Herbs database, all related formulas that may contain that herb will automatically appear.

When editing or adding new formulas or patent formulas, you may click on the "Herbs" tab and add each herb by simply clicking on the first blank line on the herbs list. This will pop up a list (alphabetical by pinyin name) of all herbs in the database. Clicking on the appropriate herb in the list will auto-enter it into the list, as well as its related Chinese characters and Latin or pharmaceutical names (if available). If the herb you would like to add is not on the pop-up list, simply double-click on the pop-up list field, and manually enter the herb name. If you later add the missing herb to the Herbs database, your entry will be automatically linked. You may also enter dosages for individual herbs in a formula. By default, Trigram Software did not wish to add these values for any formulas, except where they were offered by a patent formula's vendor.

Checking Suppliers and Adding to Inventory

Supplier and inventory information may also be viewed and adjusted from each of the Herbs, Formulas, and Patent Formulas databases. For standard herbs and formulas, you may access this information through the "Suppliers & Inventory" tab when viewing an individual herb or formula ("View As Form"). Vendors in the Vendor Information database who supply standard herbs and formulas show up on the left side of the screen with questions marks next to each of them. To get more information on any one of these vendors, simply click on its associated question mark. Additional vendors may be added through the Vendor Information database.



To the right of the list of suppliers is a list of current inventory for this item. If this herb or formula is currently in inventory, the item's vendor and the amount of the item on hand will appear on the list. To go to that item in the inventory database, simply click on the box to the left of that item. If you wish to add this item to your inventory, click the "Add To Inventory" button on the top of the screen. Similarly, the "Patients" tab will list all patients who have bought this formula, and clicking on the box to the left of their name will take you to the invoice upon which that formula is listed.

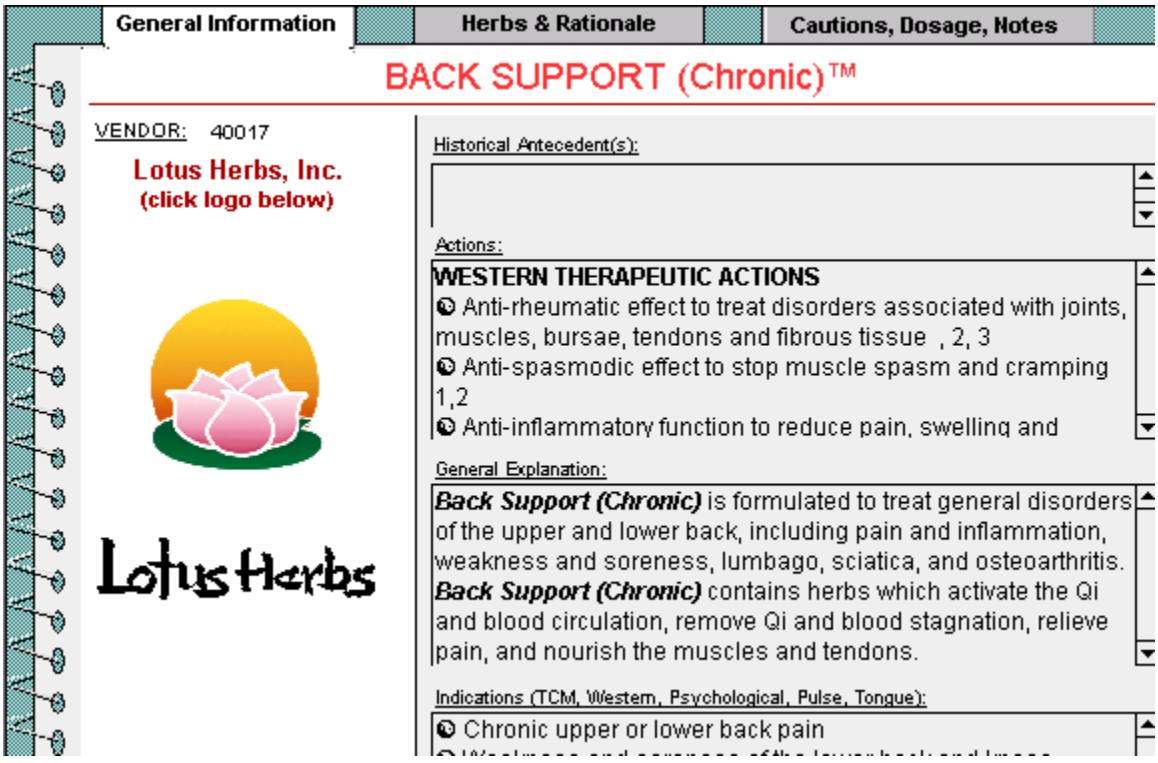
Duplicating Standard Formulas

In many cases, you may wish to add your own formula to AcuBase™. If it is based on a standard formula that is already in the database, you may duplicate the pre-existing formula, and then simply rename and modify it as you see fit.

To duplicate a formula, click on the name of the formula in View As List mode, or view the formula in View As Form mode, and then go to the Commands menu and select "Duplicate This Formula."

Features Unique to the Patent Formulas Database

The Patent Formulas database is unique in several ways. First, all data from the Patent Formulas database was submitted to Trigram Software for inclusion in AcuBase™ by the creators and/or chief distributors of the formulas. At the time of this writing, those vendors include: K'an Herbs, Health Concerns, East West Herbs, Evergreen Herbs, Golden Flower Chinese Herbs, Mayway (Plum Flower and Min Shan), Chinese Modular Solutions, NuHerbs, Spring Wind Herbs, Tashi Enterprises (Min Tong), and the Institute for Traditional Chinese Medicine and Preventive Health.


General Information
Herbs & Rationale
Cautions, Dosage, Notes
BACK SUPPORT (Chronic)™
VENDOR: 40017
Lotus Herbs, Inc.
(click logo below)
Lotus Herbs
Historical Antecedent(s):
Actions:
WESTERN THERAPEUTIC ACTIONS
Anti-rheumatic effect to treat disorders associated with joints, muscles, bursae, tendons and fibrous tissue , 2, 3
Anti-spasmodic effect to stop muscle spasm and cramping 1,2
Anti-inflammatory function to reduce pain, swelling and
General Explanation:
Back Support (Chronic) is formulated to treat general disorders of the upper and lower back, including pain and inflammation, weakness and soreness, lumbago, sciatica, and osteoarthritis. Back Support (Chronic) contains herbs which activate the Qi and blood circulation, remove Qi and blood stagnation, relieve pain, and nourish the muscles and tendons.
Indications (TCM, Western, Psychological, Pulse, Tongue):
Chronic upper or lower back pain

Because the formulas in the Patent Formulas database were developed by their associated vendors, and because their related written materials are copyright protected, AcuBase™ does not offer any patent formula-related reports. You may, however, modify as much information as you would like to in the Patent Formulas database

Finally, unlike standard herbs and formulas, each of which may have several vendors, each of the patent formulas has only one vendor associated with it. This vendor's name may be seen in both Form View and List View. From Form View's General Information tab, the left side of the screen shows the vendor name and logo(s), and, just below the logo(s), the amount of the patent formula in stock in the Inventory database. To get more information on a given vendor, simply click on that vendor's logo or on the "Go To Vendor" button (at the top of each screen). To add or modify a given patent formula in the Inventory database, you may also click on the "Add To Inventory" button on the top of the General Information tab screen.

Note: Patent formulas, as well as standard herbs and formulas, do not have prices associated with them because prices are constantly in flux and vary by the form in which the items take (powders, capsules, etc.). In addition, AcuBase™ does not use the vendor item numbers for vendor-related patents, as they may conflict with the ability of the program to properly index relational data. Both prices and vendor-specific item numbers may be added from within the Inventory database.

The Herb / Drug Information Database

The Herb / Drug Information database is the latest addition to the AcuBase™ Reference Library. Provided by Lotus Institute and Evergreen Herbs founder, USC pharmacology professor, and California licensed acupuncturist John Chen, Pharm.D., Ph.D., OMD, this database contains lists of the most common prescription and over-the-counter medications, along with comments on how herbal absorption may be affected. The Herb/Drug Information database also contains 1,000 common medications and their herbal equivalents from the Evergreen Herbs formulary. (Each Evergreen formula may be found in the Patent Formulas database.) All information in this database may be printed out.

The Herb/Drug Information database comes with an extensive written commentary by Dr. Chen on herb/drug interactions, as well.

Note that this section of AcuBase provides valuable information for doctors and patients who prefer to use herbs rather than drugs, or to use herbs as supplements to the regular prescription medication. The indexes compare the similarities between drugs and herbs. However, it is important to note that the indexes do not imply therapeutic equivalence, and the herbal alternatives as listed are not substitutes for their corresponding drugs. Professional judgment and careful evaluation must be exercised prior to recommending the herbal formulas to the patients.

Appendix A: Frequently Asked Questions

Over the years, we have had a number of the same questions asked of us repeatedly. What follows are some answers to the most frequently asked questions, as well as a number of answers to questions we anticipate receiving with this new version of AcuBase™.

Question (Q): Do I need to keep the AcuBase CD in my computer in order to run the program?

Answer (A): NO. Once you have installed AcuBase™, you do not need to keep the CD in the CD-ROM drive unless you wish to access text files used to set up a relationship with a billing clearinghouse (see the Electronic Billing chapter), or to access the Adobe PDF version of this user's manual.

Q: I know that I need to keep a backup of my AcuBase data current at all times. How do I make a backup?

A: It is *essential* that you keep a backup of all files related to AcuBase™, as well as any and all other mission-critical files that you use. This is your responsibility as a businessperson and a prudent computer user. We recommend using a Zip Drive (By Iomega) on a daily basis (use 5 disks—a separate disk for every day of the week), which can hold at least 100 megabytes of data on each Zip disk. Any other media that may provide reliable backup of at least 50 megabytes of data and is easy to restore in case of data loss may also be employed. Note that backing up to a CD-RW makes the AcuBase™ files read-only. If you need to recover lost data from a backup on CD, you will need to select all of the files after you've moved them to your hard drive, and then un-select the "Read-Only" designation in order to make your files modifiable.

Simply backing up the AcuBase™ folder/directory (with the program CLOSED) will save all data related to the program. Mac users, copy the AcuBase™ folder from your hard drive to your backup media. PC users, back up the AcuBase directory, located at C:\program files\trigram software\acubase (where "C:" equals the letter of your hard drive).

Q: I have a really old / really new computer. Will AcuBase work with my computer and operating system?

A: AcuBase™ will run on any Macintosh with a Power PC 601 Processor or higher (including Mac OS X) with at least 32 MB of RAM, or an Intel-compatible Pentium-class 486/33 or higher computer with 32 MB of RAM. Your operating system needs to be any of the following: Apple System 8.1 or higher, Windows 95, Windows 98, Windows Me, Windows 2000 Professional, Windows XP, or Windows NT 4.0 (with Service Pack 3 or later). You also need a hard disk with at least 50 MB of free memory, a CD-ROM drive, and a laser printer or high quality ink jet printer.

Q: Why aren't all of the menu items for each screen explained in the user's manual or anywhere else?

A: AcuBase™ was created in FileMaker Pro 5.5. As a result, users have access to many of the menu items at the top of the screen that FileMaker provides. We highly recommend that AcuBase™ users stick to the buttons at the top of each screen which have been provided. While you may add a new record, for instance, from the File menu, the New Record button has scripts that make sure that the integrity of the database is kept consistent. The one exception to this suggestion is the Commands menu. The Commands menu has a list of commands for which keyboard shortcuts may be used. These shortcuts, once learned, may provide faster navigation through the program without the necessity of using the mouse.

Q: Can I import data from other programs, or export data? It appears that there is an import and export capability in the program.

A: Trigram Software will not support importing or exporting to or from AcuBase™, except within the context of upgrading from a previous version of AcuBase™. We highly recommend that you do NOT attempt to import or export records to or from AcuBase™. AcuBase™ is a relational database, which means, among other things, that the information you are viewing at any one time may actually be kept in one of many different related databases that you never see (to see what we mean, the next time you go to the Patient Information and Billing database, click on the "Window" menu to see all of the related databases open in the background). AcuBase™ is NOT designed to export to QuickBooks or any other program. You may, however, copy data or a large block of text from one field or document, and paste it into a given field within AcuBase™. (For instance, if you have written an intake for a given patient in Microsoft Word, you may copy it there, and paste it into a new Intake (under the "Intakes and Activities tab") within that patient's record in AcuBase™.

Q: How do I upgrade from an older version of AcuBase to AcuBase 2.003?

A: If you own AcuBase 2.000 or 2.001, even if you upgraded through the Web to version 2.002, you will need to have Trigram Software convert your data to the 2.003 version. The reason for this is that the current version, 2.003, was created in a newer, faster database engine that is not compatible with the engine used to run older versions. Trigram Software charges a fee of $99 to upgrade your data from an older verison.

If you bought version 2.002 and have purchased this new 2.003 version, and would like to bring your existing data into the version, you will need to take the following additional steps to ensure that all patient information, billing, preferences, activities, and inventory information properly imports into the new version.

1. Do a "Find All" for Existing Data… The import of your existing Billing data requires that we first "Find All" information in the Lineitem, Txcodes, and Diag databases. You are simply preparing the databases to be moved into the new program.

   A. From with the OLD (2.002) AcuBase™ program, start at the Main Menu, go to the Patient Information and Billing database, and select any patient. Go to the "Billing" tab, click on the "Window" menu at the top of the screen, and select the "Lineitem" database. From that Lineitem screen, you will need to do a "Find All" to bring all records into the database. PC users hold down the Ctrl button and the letter "J" on the keyboard; Mac users the Apple/Command button and the letter "J". You may not see anything happen on the screen, and that's okay.

   B. Next, click on the "Return to Main Menu" button, and click on the Preferences button. Select the "Billing Codes" tab, and once again click on the "Window" menu at the top of the screen, this time selecting the "Txcodes" database. From here, once again do a "Find All" (PC users hold down the Ctrl button and the letter "J" on the keyboard; Mac users the Apple/Command button and the letter "J".)

   C. Finally, click on the "Return to Main Menu" button, and click again on the Preferences button. Select the "Diagnosis Codes" tab, click on the "Window" menu at the top of the screen, and select the "Txcodes" database. From here, once again do a "Find All" (PC users hold down the Ctrl button and the letter "J" on the keyboard; Mac users the Apple/Command button and the letter "J".)

   D. Return to the Main Menu and close AcuBase™.

2. Rename Files to be Imported… The second major step in preparing to import existing data from your 2.002 version into the 2.003 version of AcuBase™ involves renaming certain files by adding the number "2" to the end of them. Later, AcuBase™ will look for these files and import the data within them. Because AcuBase™ is looking for these file names, if they are renamed improperly (due to typos, etc.), the import of your data will fail. So be sure to follow these directions as closely as possible! Note that, if you already have file names with the number "2" appended to the end, you should replace them with the renamed files below.

   A. With AcuBase™ closed, go to your old (2.002) AcuBase™ program directory/folder. (Mac users, this is wherever you installed AcuBase—your hard drive or desktop, most likely. PC users, using My Computer or Windows Explorer, go to your C: drive [hard drive] and go to Program Files / Trigram Software / AcuBase directory.)

   B. Within the 2.002 AcuBase directory (and, again, with the program closed), you will need to rename the following files exactly as you see below:

Old File Name	New File Name
activity	activity2
billing	billing2
bldprdts	bldprdts2
diag	diag2
herbcos	herbcos2
insur	insur2
invconts	invconts2
inventor	inventor2
letters	letters2
Lineitem	lineitem2
mainmenu	mainmenu2
patients (NOT **patents**!)	patients2
patinfo	patinfo2
refer	refer2
txcodes	txcodes2

3. Once you have renamed the above files, select all of these files at once and Copy them (go to the "Edit" menu, then "Copy").

4. Paste all of these files into your newly installed AcuBase folder. (Mac users, this is wherever you installed AcuBase 2.003—your hard drive or desktop, most likely. PC users, using My Computer or Windows Explorer, go to your C: drive [hard drive] and go to the Program Files / Trigram Software / AcuBase 2.003 directory.)

5. Once the files have been pasted into the AcuBase 2.003 folder, you may open the new 2.003 program.

6. You may now run the import by going to the Commands menu from the Main Menu, and selecting "Update from 2.002 Version of AcuBase." You will be asked to verify that you have completed the major steps listed above, and will be given the option to stop the process if you had missed a step. You will also be asked a series of questions to help AcuBase™ determine which files it needs to import from. As you confirm that you have completed all relevant steps, the import will proceed automatically.

   Once the import is complete and the program closes, open it back up again and check that your data has come across properly. If it did not, you will need to uninstall and reinstall AcuBase™, and then repeat these instructions

Q: Why do my reports or print jobs sometimes look fine in Preview mode, but then only print one record or one line from my printer?

A: On some occasions, the print preview of a report may look good, but when you go to print, the printed version only prints one line of data in the report. If this happens, go to print the report again and, when your printer's print dialog window comes up (the first window after the print preview), make sure that "Print: Records Being Browsed" is selected, rather than "Print: Current Record."

Q: Why is it that, when printing superbills or HCFA forms for some of my patients, the provider name and clinic information (HCFA box 33) do not show up? I know that I entered this information correctly into the Preferences section of AcuBase!

A: This issue often comes up when patient information has been entered prior to setting up provider preference information. Because each patient is assigned a provider as soon as the patient is entered into the database, if the provider preferences were not entered *before* the patient was put into the database (or were changed after the patient was put in), the correct provider information will not show up in box 33 of the HCFA 1500 form. You will have to go back and reassign the correct provider to each patient in the database to fix this. To do this, simply go to the Patient Information tab for the patient in question, click on the Provider field at the top of the screen, and pick a provider OTHER than the correct one. Click anywhere to set and save this incorrect provider. Then click in the field again, and pick the correct provider for the patient. Doing this resets the patient record to the correct provider. If you are seeing this issue come up repeatedly with many different patient bills, you may wish to do a "Replace All" for the provider field so that you do not have to manually reassign the provider for each patient in the database individually. To do this, see the instructions on the "Replace All" feature discussed in Chapter 2.

Q: How do I duplicate a patient record or an invoice?

A: Unfortunately, even though you may go to the Records menu and select "Duplicate Record," we HIGHLY recommend you do not do this. Because AcuBase™ is a relational database, duplicating a patient record also duplicates its internal (unique) reference information, and hence all related information (such as activities, invoices, etc.). This means that any changes you make to the newly duplicated record will also be made to the old record, and you will essentially have two duplicate records, neither of which you can modify without the modification happening in both the old and the new records. (Make sense?) Further, if you do duplicate a record, and then try to delete it, you will delete both the newly duplicated AND the original record!

Instead of duplicating, take the time to create a new patient record or invoice. It may seem time-consuming, but it will actually save you time over a failed file duplication. Also remember to stick to the buttons on the top of each screen, using only the Commands menu and File menu as necessary.

Q: Does AcuBase have a Spelling Dictionary?

A: Funny you should ask… Why, yes, it does! AcuBase™ users may check the spelling of any record by going to the Edit menu, and selecting "Spelling." The default dictionary is U.S. English. Select "Check Record" to check only the record you are viewing, or "Check All" to check all records in the database you are looking at. You can also select the option under Edit / Spelling of "Select Dictionaries…" Select the User.UPR file in the your AcuBase directory's "FileMaker Extensions" directory in order to build your own custom dictionary (useful with all the Pinyin you may be using).

Q: How can I limit what I find or what I print to a given date range? How can I find all of the records in the database for a given report?

A: A date range is entered as two dates with "…" between them. For example, to find all transaction for the year 2001 only, after you click the "Find" button at the top of the screen, or from the "Find Info for Reports" screen that comes up when you try to create a new report, you would enter "01/01/2001…12/31/2001" [without the quotes] and click the "Find" button.)

To find all records, after you click the "Find" button at the top of the screen, or from the "Find Info for Reports" screen that comes up when you try to create a new report, simply click on the "Find" or "Continue" button without having entered any find criteria.

For more extensive information on all of the different ways you can Find records, see *"To Find Records"* section of this user manual's *Chapter 2: Getting Started with AcuBase* .

Q: When I print a Transaction Summary By Month report, why don't my months come out sorted correctly?

A: Some users have reported issues with months and their years printing in incorrect order. We have found this to be an issue with users who have data in the database that dates back to, or before, the year 2000. If this happens to you, simply run this report for one year at a time rather than for multiple years. To do this, when the Find Info for Reports window comes up (before the print preview), in the "Invoice Date(s)" field, enter your date range and click the "Find" button. (A date range is entered as two dates with "…" between them. For example, to find all transaction for the year 2001 only, you would enter "01/01/2001…12/31/2001" [without the quotes] and click the "Find" button.)

Q: How do I print all of the invoices for a given patient (onto either a HCFA 1500 form or a superbill)?

A: To print all invoices for a given patient, go to that patient's Billing tab, select a pre-existing invoice or create a new one, and then click on the "View All Invoices" button. From View as List mode, you may print all of the patient's invoices on either HCFA 1500 forms or superbills by clicking on the appropriate button at the top of the View As List screen. When the option to print comes up, be sure that the selection at the top of the print screen is "Records Being Browsed," and that you have selected "All" pages. Otherwise, you will only get one line of text or one invoice

Q: From within Inventory, after I have selected an item from List View to look at individually (in Form View), the "Next Record" and "Previous Record" buttons don't seem to work. I know that I have more records to view. What gives?

A: If you have more than one item in inventory, clicking on the "Next Record" or "Previous Record" buttons from within Form View should step you through each item alphabetically. If these buttons appear not to do anything, try clicking on the "Find All" button at the top of the screen first, and then try the Forward or Back buttons again.

Q: I want to print out a patient's billing onto a HCFA 1500 form. What fields do I need to fill out on which screens, and what's the fastest, easiest way to do so?

A: To start with, you should set up the Billing preferences from the "More…" tab, which may be found when you click on the Preferences button from the Main Menu. Set the Default Invoice field to "HCFA 1500 Form;" and set up the HCFA 1500, Box 24 fields to pre-enter any information that you use repeatedly in those fields (line 24 a-k) on the HCFA form.

Once these preferences are set, you can go to Patient Information and Billing from the Main Menu and, when you enter a new patient's information, be sure to enter data into all fields that have HCFA line numbers associated with them. (If the patient is already in the database, click on the patient's name in the View As List mode when you first enter the Patient Information database, and then click on View As Form or on the little button to the left of the patient's name to go directly to the Patient Info. screen.) Once these fields have been properly filled out for a given patient, you can run as many HCFA invoices for this patient as you like without needing to re-enter this information. Click on the large pink button at the bottom of the Patient Info. screen, or simply click on the Billing tab.

From the Billing tab, click on the "New HCFA" button near the bottom of the screen. This takes you to a screen where your diagnoses should already appear (you entered them in the previous HCFA Info screen). Tab down to the Procedures section and put in the dates of service. If you had pre-entered information in the HCFA 1500, Box 24 fields in the Main Menu Preferences, those pre-entries will appear automatically after you enter a date of service.

Assuming that you have filled out the above screen properly, you may click on the "Print HCFA" button at the top of this screen to print the invoice onto a HCFA 1500 form. If your printout does not align properly with the HCFA, click on the "Align HCFA" button at the top of this screen to align it more exactly.

See the "*Using the Patient Information and Billing Database"* section of the user's manual for more detailed information about printing onto HCFA 1500 forms.

Q: I understand that AcuBase can be set up to work with a Palm OS-based handheld device. How do I synch my Palm device up with AcuBase?

A: Yes, certain features of AcuBase™ are available for synchronization with your Palm device. You need a Palm OS compatible handheld with at least 2 MB of storage, the Palm OS 3.1 or greater, and a HotSync cradle or cable. Windows users need an Intel-compatible computer with a Pentium 90 or greater, 32 or more MB of RAM. Mac users need 32 MB of RAM and Mac OS version 8.1 through version 9 (the Palm features do not yet work with OS X).

In addition to the above hardware, you also need to have FileMaker Pro 5.0v3 loaded onto your machine, as well as FileMaker Mobile. For more information on FileMaker products, visit http://www.filemaker.com.

At the time of this writing, FileMaker Mobile will not support relational aspects of relational databases on the Palm platform. Because AcuBase is a relational database, made up of about 30 smaller databases, you will need to load several of these databases onto your Palm device. Further, FileMaker Mobile will only support up to 20 fields per

database! Thus, some of the most useful information from several of the databases in AcuBase may be loaded onto your Palm device, but, like most Palm-enabled programs, you will not have the same functionality on your handheld as you do on your desktop. We here at Trigram Software recommend that you use your Palm device to load reference library information, such as acupoints, herbs, and formula information, as well as a limited amount of patient information.

Once you have FileMaker Pro, FileMaker Mobile, and AcuBase™ loaded onto your desktop, you will need to open AcuBase from within FileMaker Pro. Open FileMaker Pro and, from within FileMaker, go to the File menu, Open, and elect to Show: All Available Files. Then go to the AcuBase™ directory and open the Mainmenu.tcm file. (The AcuBase directory is located at C:\program files\ trigram software for PC users [where C: equals the hard drive letter].)

Once the Main Menu is open, you will want to make sure to open all of the databases you would like to synchronize with your Palm device, and then perform a "HotSync" operation. But before your first HotSync, you will need to enable the databases that you wish to have sync'ed up between your Palm device and your computer. Doing this requires that follow the directions in *Chapter 2: Setting Up FileMaker Mobile*, in FileMaker Mobile's user's manual.

Within the context of setting up FileMaker Mobile (the instructions from Chapter 2 of FileMaker Mobile's user's manual), you are asked to set up each database, and to select up to 20 fields from each database to appear on your handheld. We recommend the following databases and their fields, which may be opened from within FileMaker Pro. (Go to the File menu, Open, and elect to Show: All Available Files. Then go to the AcuBase directory and open the Mainmenu.tcm file. The AcuBase directory is located at C:\program files\ trigram software for PC users [where C: equals the hard drive letter].)

Patients.tcm: This database holds a lot of your patients' basic information, such as addresses, insurance company info, etc. As part of the required setup, from Chapter 2 of FileMaker Mobile's user's manual, we recommend that you use the following fields from this database, in the following order: *Last Name, First Name, Provider, DOB, SS NO, Street Address, City, State, Zip Code, emergency contact, emergency phone, Type of Case, InsurCompany, Insurcompanyaddress, insurcompanycity, insurcompanystate, insurcompanyzip, insurcompanyphone.*

Because the patient phone numbers and billing information are kept in several separate databases, that information will not appear here.

Diag.tcm: This database holds all of the diagnoses and their ICD-9 codes. We recommend that you use the following fields from this database, in the following order: *Diagnosis1, ID No1*.

Txcodes.tcm: This database holds all of the procedures, their CPT codes, and the price you charge for each treatment. We recommend that you use the following fields from this database, in the following order: *Treatment, ID No, Price, Tax, Total.*

Acupts.tcm: This database holds all information related to acupuncture points and their indications. To put all of the acupuncture point information on your handheld, we recommend that you use the following fields from this database, in the following order: *Point Number,Pinyin, English, Area of Body, Location Descr, T Function, Indications.*

Herbs: This database holds most information related to herbs and their indications. We recommend that you use the following fields from this database, in the following order: *H Pinyin Name, H Latin orPharm, H English, H Classif, H Properties, H Channels, H actions and indics, H Major combos, H Contrainds, H descr of appearance, h dosage and the prep.*

As per the FileMaker Mobile instructions, remember that you need to have these databases open when you do your HotSync operation, and each database's found set should contain the records you would like to transfer to your handheld. To find all records in each database, once the database is open on your computer, PC users hold down the Ctrl button and the letter "J" on the keyboard; Mac users the Apple/Command button and the letter "J". You may not see anything happen on the screen, and that's okay.

While the current state of integration between AcuBase™ and Palm-based handhelds is quite limited at the present time, the features and capabilities in this area will only expand and get more complex in time. At the time of this writing (November 2002), FileMaker Mobile is in its second incarnation (version 2.0). As the FileMaker product matures, so too will the integration between AcuBase on Palm-based devices and the computer. In the mean time, if you have further questions about how to get portions of AcuBase onto your Palm-based handheld, please feel free to call our technical support line at 1-888-4ACUBASE, or 1-510-654-3268.

Q: Will AcuBase work on other handhelds that are not Palm OS-based (such as Windows CE)?

A: At the time of this writing, no. But FileMaker, the makers of the database that AcuBase™ was created in, promises to have a Windows CE-based version out soon. As soon as it is available for FileMaker, we will make it available to our users, as well.

For answers to these questions, and many future updates, be sure to check our website frequently at http://www.trigram.com.

Appendix B: Technical Support

For any AcuBase™ questions or problems, start by checking the user's manual, the Trigram Software support page at http://www.trigram.com, or contact Trigram Software Monday through Friday from 9 AM to 5 PM US Pacific Time. Phone U.S. toll-free 1-888-4ACUBASE (1-888-422-8227), 510.654.3268, or e-mail support@trigram.com.

AcuBase™ 2.003 comes with 90 minutes of free customer support. After that, we charge $99 per year for 10 hours of support and unlimited upgrades. Otherwise, the minimum charge for support is $15 for the first fifteen minutes, then $1.00 per minute after that, or a $45 flat rate per call, on your Visa or MasterCard.

It is important that you register your copy of AcuBase™ as soon as you receive the program so that you may get support and upgrade pricing in the future. You may register by sending in the registration card that is in the front of this manual, or by e-mailing your name, address, phone number, date of purchase, and vendor name (from whom you purchased AcuBase™) to registration@trigram.com. You may also mail this information to Trigram Software, Attn: Registration, 6114 LaSalle Ave., PMB 230, Oakland, CA 94611.

Note that:

- Your free 90 minutes of support does not include help related to how to do your billing, i.e., which codes are appropriate to use, how many procedures to bill, etc. We also charge for all help related to electronic billing (which is included in the $99 per year support contract mentioned above).

- Your software license permits you to install and use one copy of the program on one machine only. Trigram Software does not support the use of AcuBase™ in more than one location or over a network.

- If you choose to use a password and later forget it and/or get locked out of the program for any reason, Trigram Software will charge you a fee to unlock your program and reset the password to blank.

- Trigram Software support will NOT assist you in the event that you attempt to change default layouts and/or lose data after modifying the Activities or Billing databases. If you decide to modify these files, it is assumed that you know and understand the intricacies of FileMaker Pro, and you do so at your own risk.

- If you are using electronic billing features and have any issues related to the billing clearinghouse's (Abrea's) reporting or claims submission processes, these issues should be handled by Abrea directly. Contact Abrea Customer Service at (973) 353-6209 Monday through Friday Eastern Standard (east coast) time. You may also check their website at http://www.abreaedi.com, email them at support@claimsdispatch.com, or write to them at:

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